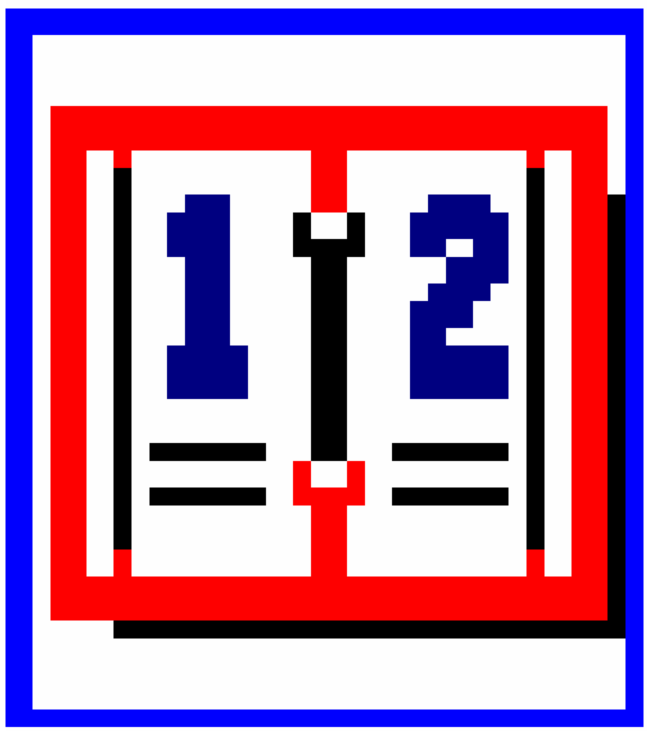
Chapter 2

# Appointment Scheduler

## Arizona AIM System



*Local Agency User Manual*
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## Capabilities

### *Purpose*

The Appointment Scheduler provides a means of scheduling or reviewing Appointments for various activities involving clients. Some of these activities are Certification, Re-certification, Food Instrument Pickup and Nutrition Education.

Family appointments are scheduled to collect applicant/client nutritional risk data and determine the applicant's certification date; which is often for a date subsequent to the date an individual applies for WIC. The system records appointment information and produces a schedule of nutritional risk assessment appointments to allow clinic/agency personnel to prepare the workload of the clinic. .

### *General Description*

The Appointment Scheduler is made up of the following functions:

### *Maintain Tables*

**These tables will be State maintained to ensure uniformity system-wide.** A System Administration role will be assigned to the appropriate State staff required to perform updates to the values in the tables. Local Agency and Clinic personnel will only be able to view and print the values in this table.
The following tables represent the actions that can be used within the clinic ranging from clinic staff to clinic operations, to client requirements:

Activities

Attendance Statuses

Items to Bring

Program Services

Reasons Office Closed

### *Maintain Operational Parameters*

The WIC Program sets operational parameters for all of its clinics to insure appropriate clinic flow and proper customer service levels. The Local Agency System Administrator sets operational parameters based upon several factors: including staffing levels and availability, clinic infrastructure, and client population demographics. Operational parameters contain business rules about how the clinic schedules appointments, but these rules can be modified to reflect the current clinic situation.

Setting proper operational parameters is important in modern WIC data systems, because the scheduling function drives the clinic. The scheduling function thus becomes an important management tool that has an impact on all aspects of the local agency WIC operation. The operational parameters need to be properly built and maintained to accurately reflect the realities of the clinic.

The system provides a flexible scheduling component, which can be tailored by users to the unique needs of each clinic under his/her jurisdiction independent of operating days and schedules of other clinics. Each local agency system administrator will be able to set operational parameters affecting his or her site and, if necessary, be able to easily change those parameters. The local agency system administrator also has the capability of establishing clinic setup for all clinics within the agency with the click of a checkbox. For example, each administrator needs to be able to set operating days and hours for the main and any satellite clinic.

In the Arizona WIC System, the following operational parameters can be established:

- Operations Management
    - Operations Management
        - Organizational Units
            - Clinic Interval
        - Staff Data

- System Administration
    - System Administration
        - Security
            - Roles
                - Calendar Builder
                - Appointment Scheduler
                - Override

- Appointment Scheduler
    - Setup
        - Clinic Tables by a Single Clinic or All Clinics
            - Dates Office Closed
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    - Staff Schedule by Clinic
        - Staff Order
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        - Staff Scheduler
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    - Classes
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        - Classes
        - Class Day
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- Scheduling
    - Appointments
        - Family Record
        - Appointment Sheet
        - Class Assignments
        - Class Attendance

Clinic Interval

This functionality within Operations Management allows the Administrator to set the duration time of each appointment slot; this is referred to as the *clinic interval*. The clinic interval between clinics can vary from a minimum of 5 minutes to a maximum of 8 hours.

The clinic interval is set by default to 10 minutes but may be modified according to clinic specifications. The clinic interval may not be modified while a current clinic calendar is in use and appointments are scheduled.

#### Staff Data

Staff Data within the Operations Management module enables the Administrator to create accounts for each staff member and assign them to one or more clinics within the agency.

They must be assigned to a clinic and home organization, and labeled with an alias to appear in the clinic calendar for calendar building and appointment scheduling.

#### Security

This module, within System Administration, allows the Administrator to set up each staff member with roles that assign security based on their job responsibilities within that agency and clinic. For example, Local Agency Administrators are given the calendar builder role, while clinic staff is assigned an appointment-scheduling role; which may or may not include an appointment override role.

#### Clinic Tables

This module is used to set up scheduling rules based on clinic operational parameters. These rules are applied, when building a schedule, by issuing a series of edit messages warning users when they are working outside of the established operational parameters. In most cases, the user is able to 'override' the edits if necessary. This module also provides the ability to apply the clinic rules across the agency if all clinics conduct business in the same manner. This operational process is broken up into 3 sections:

##### Dates Office Closed

All statewide holidays and non-working days are defined. In this section, clinics days of operation are configured using pre-defined statewide holidays and non-working days. Users are thereby prevented from scheduling any activities/services on a day when the clinic is 'closed'.
Holidays and non-working days may be designated to one clinic and applied to "All Clinics" within the agency if the other clinic(s) operate identically to the clinic where the data was entered.

##### Hours of Operation

The days and hours of operation for each main and satellite clinic in the agency are set up here. Other clinics in the agency with the identical hours of operation may use the "All Clinics" functionality to apply the same hours to all clinics.

##### Clinic Services/Activities

This section of the module offers an effective time management tool. Time duration can be assigned to each service (client-based) and activity (non-client based) for which a staff member performs within any particular clinic. It is possible to override the duration of a service within the scheduler.
Other clinics in the agency with the identical duration and services/activities may use the "All Clinics" functionality to apply the same hours to all clinics.

### Staff Schedule

This module enables the Administrator to schedule staff to support clinic activities and services. Managing staff resources is an important component in clinic flow and operations.

The Appointment Scheduler ensures that the Administrator can schedule each staff member to perform only the services for which they are qualified, based on experience, education, or other pre-defined criteria. For example, certain staff may be allowed to certify clients while others may only be allowed to issue food instruments.

The Administrator can also designate non-client related activities for each staff member that will preclude them from seeing clients. For example, Staff Member 1 might be scheduled to work in the clinic from 9:00 AM to 4:00 PM today but they are not seeing clients from 9:00-10:00 because of administrative activities they need to perform. This module is broken up into 4 sections:

#### Staff Order

Once the Administrator selects a clinic, all staff members assigned to that clinic will be presented. Here the user will determine in which order the staff will appear in the scheduler. The method of staff order is based on the staff members' workload assignments.

The number '1' indicates the first position; the number '2' indicates the second, and so on. The number '0' will prevent the staff member from appearing in the scheduler on that day.

#### Staff Day

The administrator will use this function to manage the staff members' day by assigning services and activities in various time slots for each day of the week.

#### Staff Scheduler

This section of the module will create appointment slots for each staff member. The Administrator can also use this section to clear appointment slots for the month, or close all open appointments for the month for specific or all staff.

#### Edit Schedule

This section is used to edit the daily schedule of any or all staff member(s) in the selected clinic. The Administrator may choose to fill day, clear day, or close open appointments.

### Classes

This module enables the Administrator to effectively and efficiently create and manage Nutrition Education classes within the agency for clinic use. This module is broken up into 4 sections:

#### Class Category

Classes are broken down into various class categories (Maternity, Infant, Breastfeeding, Child, Nutrition Topics, & Health.) These Class Categories are State defined and maintained to ensure consistency across Local Agencies.

#### Classes

This section will allow the Administrator to either create or maintain classes offered by the agency. The Class Name and Category fields are mandatory. Optionally, when creating classes the user may choose to specify the language and the staff member assigned to lead in the instruction. The maximum number of families to be scheduled for the class, as well as, the class start and end times is also defined here.

#### Class Day

This section gives the Administrator the opportunity to set-up a day of classes for the clinic.

#### Schedule Class Day

In this section the Administrator publishes new or existing classes to the calendar for the specified clinic. AIM provides the flexibility to schedule classes on either an as needed or a monthly basis.

### Scheduling Appointments

This module is for day-to-day administering of client appointments. AIM functionality includes scheduling and re-scheduling family appointments, searching for open appointment slots, and printing appointment notices in both English and Spanish. Scheduling of Nutrition educations classes are also perform within this module. This module is broken up into the following 4 sections:

#### Family Record

The family record displays appointment and certification statuses for each client within the selected family unit. From here the user may print the client's appointment notice with the list of things to bring to the appointment. The user may also view the family's appointment history by client as well as enter notes and comments for each client in the family.

#### Appointment Sheet

This section displays the number of appointment slots, staff columns, and the hours available to schedule the appointment are predetermined from the setup of the calendar. The user selects an appointment slot to assign to family members. The user must choose the type of appointment being set for each client in the Family Detail section.

The appointment status is maintained here (kept, pending, or missed) depending on the outcome of the appointment. The appointment status may be maintained manually or through end of day.

This section also allows the user to search, using various criteria, for open appointments or the option is given to reschedule or delete existing appointments.

There is edit messaging to prevent the user from scheduling appointments when the slots are not available. There are several role based functions that allow may allow the user to override the unavailable or inappropriate appointment slot.

#### Class Assignments

This section allows users to view the list of offered Group Education classes, the class limit, count for a specific class, and add Families to a class within the clinic. A user may only schedule a number of Families for the class equal to or less than the Class Limit value, unless the user modifies the Class Limit value field in the Class Attendance screen.

When the user enters the Class Assignments tab, the system will display all the open classes for the family's clinic based on the search parameters. The user selects the desired class, and clicks the Add Family to Class button to schedule the family for that class.

The search parameters a user can enter is a date in this Search From Date field and the classes displayed will only show for those dates equal to or after the date entered. Optionally, the user can double click in the field and invoke a calendar popup. This popup allows the user to click a date on the calendar and then the system will populate this field with the selected date. Additionally, the user can select a Class Category from the list of values to refine the list of classes that appears in the Classes Available section.

#### Class Attendance

This section is a follow up to the Class Assignments screen. This screen may be accessed two ways. The first is from the Appointment Sheet. The user clicks a slot with the class id, and then clicks the Class Attendance tab to view and update the class particulars. The second method to access the screen is by selecting the Class Attendance tab. The user queries to view and update the class information,
This window allows users to: view/modify the class limit for a specific class, enter families into a class, update a Family's class attendance, Update the Families that received food instruments at the class, select which Families for whom not to print food instruments, print food instruments for class members, indicate refusal of Nutrition Education by Families (checking off the FI Rec'd box and updating the Attendance field to Missed), and perform a search for a Family's ID by double clicking in the Family ID field.

Also, the user is able to preview and print Food Instruments for each member of each Family in the class. The user is able to preview different family member's food instruments by clicking on that family member's name.

The user is able to click the All Attended button which updates all the families attendance from Pending to Kept for the class. The user can then individually modify any one of the family's statuses from Kept to Missed.

## *Maintain Appointment Schedule*

#### Maintain Appointment Scheduling for Food Instrument Pick-Up

The WIC System associates two or more WIC clients from the same family using a Family Identification Number (which is system generated). The system is capable of scheduling, on-line, the same date and time for the family's visit to the clinic for food instrument pick-up.

The WIC System maintains client food instrument pickup. The system allows the user to schedule pickup dates and times to be the same as the client's scheduled nutrition education class to encourage the client to attend education classes.

Additionally, if the on-demand generation function is called directly from the scheduler, the current family ID will be carried into the on-demand window to reduce keystrokes.

#### Maintain Appointment Scheduling for Nutrition Education

The WIC System enables users to schedule nutrition education services such as secondary nutrition education classes, individual nutrition education, and document the nutrition education topics and materials in the Care Plan screen of the Enrollment and Certification module.

#### Track the Appointment Date, Type, and Length for Each Client

The system tracks appointments by providing a grid where appointments are scheduled and maintained. Each appointment is clearly delineated as to the date, type of appointment and appointment length. Clients can be scheduled for the same time slot for more than one service or activity.

The System is capable of scheduling, on-line, the same date and time for the individual members of a family to visit the clinic. Families may have multiple appointments scheduled, and have a combination of Service and Class appointments. Families may schedule an appointment with multiple staff members for the same time if the schedule permits.

The WIC System is able to confirm/enter an appointment by entering a Family's ID number in an open appointment time slot. The appointment interval is predefined by the clinic operational parameters.

The system also provides the capability, within the Daily Schedule function, to view an entire day's schedule.

#### Maintain Client Appointment History

The WIC System creates and maintains an individual client appointment history that displays all scheduled, attended and missed appointments for the client for their tenure with the WIC Program.

### Appointment Availability Search

The scheduling function allows the user to locate open appointment times using an automated search facility.
The system provides an automatic search for the next available appointment of a certain type. This function is initiated by clicking a push button in the Appointment Scheduler window. A dialogue box is shown which allows the user to specify criteria to make the search on. Among other criteria, the search can be done looking for specific staff or across all staff scheduled to be in the clinic on a particular day.

The system displays a highlighted green cell in the time slot for the first appointment availability.

### Schedule Appointments

The WIC System supports the scheduling of appointments for applicants, enrollees, and clients up to twelve months in advance. Appointments are scheduled and linked to families by Family ID.

#### Advance Scheduling Capabilities

The system allows scheduling to take place up to twelve months in advance.

#### Indicate Kept/Missed Appointments

The attendance status is utilized to mark appointments in the scheduler. Statewide codes are developed which indicate whether appointments were kept, missed, pending (in the future), or etc. The attendance status is utilized throughout the system in the reporting of appointment activity.

The scheduling component requires that appointments be marked as kept or missed using a variety of codes. Attendance statuses may be used manually to mark the outcome of an appointment, or end of day will system generate the attendance status based on the outcome of an appointment.

There are multiple attendance statuses for appointments in the Arizona WIC System; pending, kept, and missed, rescheduled, deleted, and walk-in.

“Pending” is the initial state of the appointment when it is booked or established. The system automatically generates a pending status to future appointments.

“Kept” is assigned as clients show up at the clinic, when food instruments are printed, or when a notice of ineligibility has been printed for the client. This attendance status is assigned manually by the user or via end of day processing.

“Missed” is assigned to those appointments that are not kept and the client did not call to reschedule or cancel the appointment. . This attendance status is assigned manually by the user or via end of day processing.

“Rescheduled” is system assigned when the family appointment has been scheduled to another appointment. This attendance status is view only in the Appointment History of the Family Record tab.

"Deleted" is a system assigned attendance status used when the family appointment or family class appointment is deleted from the appointment scheduler and/or class attendance. This attendance status is view only in the Appointment History of the Family Record tab.

"Walk In" is a user assigned attendance status, and is considered a "kept" appointment. It is used to designate an appointment that was not previously scheduled for the current day.

#### Indicate Kept/Missed Appointments

The system updates a client's appointment status during the end of day processing. If the client has received FIs, or a notice of ineligibility has been printed for the client; the appointment will be marked as kept.

Also, if the client is an exclusively breast-feeding woman and meets the criterion above, her infant's record will also be marked as kept during end of day processing.

The scheduling administrator assigns one of the statuses to each appointment in the schedule. The table of valid statuses and their meaning is maintained at the State Agency level.

#### Provide Automatic Schedule Free Up

The system automatically frees up appointment slots for clients whose appointments are rescheduled. No missed appointment notice will be generated for rescheduled appointment slots.

#### Remove Transferred/Terminated Clients

The WIC System deletes future appointments if the client is terminated or transferred to another clinic.

#### Provide Overbooking Capabilities

The WIC System provides the capability of overbooking clinics by allowing local agency administrators to assign a number of staff for overbooking. For example if a clinic had three staff members and wished to provide a 100% overbook capability, they might want to assign another three to handle overbooking. The additional three staff for overbooks are actually "pseudo" staff who do not really exist. Walk-ins are assigned to these pseudo staff until a time slot becomes available due to a missed or rescheduled appointment. This function allows overbooking without actually assigning staff to the clinic. Once a schedule is set up with a pseudo staff, more pseudo can be added later on, as clinic needs dictate.

#### Provide Flexible Time Allocation

The WIC System provides a flexible means of scheduling which allows users to adapt the scheduler to the needs of the clinic. The number of time slots for a particular service at the clinic can be overridden at anytime. For example, if a certification is scheduled to take three 15-minute time slots in the schedule, the scheduling administrator can increase/decrease the duration as needed.

The system enables clinic scheduling administrators to institute a variable time slot model by creating a fixed slot length for the clinic (e.g. ten minutes), while allowing administrators to define how many slots each service will take based upon its time length. For example, if certification takes 40 minutes and the clinic is scheduled in ten-minute time slots, the certification will take four time slots in that day's schedule for a staff person.

The default time slot interval is currently ten minutes.

### *Documentation of Nutritional Education*

The Arizona WIC System provides the ability to document nutrition education to a client with a scheduled appointment. The Care Plan's Follow Up Nutrition Education screen displays the client appointment; in which the nutrition education topic is documented for the family. Assigning materials for the nutrition education topic is optional and applied specifically to the client's record. If a client within the family is not given an appointment type, nutrition education cannot be documented to the client record.

### *Generate Appointment Notices, Reports and Labels*

The WIC System retrieves data from the client and appointment database and provides appointment notices (Appointment, Reschedule, Ineligibility). A range of reports is also produced providing detailed appointment information. Listed below are a few examples of various outputs.

#### Produce Appointment Notice

This selection produces a letter that informs a client of an appointment. This letter includes a policy statement regarding missed appointments.

#### Produce Reschedule Notice

This selection informs a client that his or her appointment has been rescheduled.

#### Produce a Daily Schedule

The WIC System produces a Daily Schedule report for a clinic for a single date.

#### Produce List of Appointments

The WIC System produces a list of appointments for a user-defined appointment date for one or all clinics in the agency. Service, Time, or Staff parameters can sort the report. The report shows dates scheduled and unavailable appointment slots.

#### Produce Summary of Appointment Statuses

The WIC System produces a summary of appointments to summarize the appointment services, which are missed, kept, rescheduled, walk-ins or deleted/cancelled for a user-defined date range.

#### Produce List of Missed Appointments Summary

The WIC System produces a summary of missed appointments for a user-defined date range.

#### Produce List of Missed Appointments

The Arizona WIC System produces a list of missed appointments by: Clinic, staff or time or service, Participant, date, and start time, along with details about the Participant. This report provides a history of missed appointments. Participants deemed WIC ineligible during an appointment will not appear on this report as their appointments are denoted as 'kept". For Participants with confidentiality checked on their Certification record, the term "no phone calls" will be displayed on the report under the Phone field.

#### Produce Override Appointments Report

The WIC System produces a report to display appointments that were overridden by users. Included in these are:

- Appointments that had a different service assigned than the one that was scheduled for that slot
- Appointments in which the primary language of the staff member and Family do not match
- Appointments which were scheduled outside the Federal Processing Standards

The report parameters selection is for a single clinic or all clinics in a specified month in a Local Agency.

#### Produce No Show Rate Report

The Arizona WIC System produces a No Show Rate Report; which allows the user to retrieve, calculate, and display No Show Rates by service for all or a single Clinic in a Local Agency for a selected month and year. The report generated will provide a duplicate count for people who are no-shows more than once for the month and year selected on the Parameter Form.

#### Produce a Staff Schedule

The WIC System produces a Staff Schedule report for a clinic, staff member and/or language for a single date.

#### Produce Summary of Group.Class Appointments

This report displays, by Nutrition Education Service and Topic, a summary of the appointments kept and missed for the user-defined date range for a single clinic or all clinics.

#### Produce a List of Missed Appointments Unreached by Autodialer

The WIC System produces a report of the appointments, which have been missed by Clinic, Participant, date, start time, and were not reached by the auto dialer mechanism.

(This report Parameter Form and format has been described to be similar to the List of Missed Appointments Report above, but final decision as to the selection criteria and final report design will be made following implementation of the auto dialer mechanism.)

#### Produce Mailing Labels

The Arizona WIC System produces mailing labels through the end of day process and on-demand.

### *Provide Ease of Use Scheduling*

The AIM Program's Scheduling function allows for utilizing standard Windows functions as well as the ability to hot key to the scheduler from several modules in the system.

#### Support Ease of Movement to Other Functions

The WIC System fully supports ease of navigation between the appointment scheduler and other modules within the system. Using the Appointment Scheduler push buttons does this navigation.

By clicking on a push button, users can move from the Precertification screen of the Certification/Enrollment module to the scheduler, schedule a client and then return to the original Precertification function.

Provide Extensive Help Features

The WIC System provides several tiers of "Help." The first tier of help is a message being displayed at the bottom of the window; which prompts users to the action relative to where the user is in the window. For example, in the Family Record tab, the cursor lies in the Family Id field and the prompt is "Select the Family ID from the list of values available, or Double Click, or Press F2 to go to Client/Family Lookup for an existing family." This prompt also illustrates another level of help, the list of values function. This function provides the user with a scrollable list of values from which the user can pick the most appropriate entry.

Another help tier is the Windows Help feature, which is shown at the top of all windows. This help feature is a context sensitive help, which can contain any information that Arizona WIC deems appropriate. For example, this area of help could include passages from the policies and procedures manual, FCS regulations, samples of how the function should be done, etc.

Integrate with Client Search

Another method used to access help is the integration of the Client Search window into the scheduling function, as mentioned in the above Help section. The Client Search window can be accessed from the scheduler and perform a lookup using any of the criteria below that the user deems appropriate.

The components of the Client Search window are as follows:

Client ID

Last Name

First Name

Middle Initial 1

Middle Initial 2

Birth Date

Gender

Local Agency

Clinic

Family ID

Authorized Representative 1Last Name

Authorized Representative 1First Name

Phone

Phone Type

Mailing Address

Certification Start Date

Certification End Date

City

County

State

Zip

Zip + 4

### Provide Notes, Remarks, and Comments Capabilities

The AIM Scheduler allows the user the option to record comments about upcoming class appointments, and record notes according to client appointments. This function assists WIC Staff in better serving individuals and groups of clients in a more efficient manner.

The appointment note(s) are available when a client is selected from the Clients section in the Family Record. Staff must have the capability to add, change, or delete these miscellaneous messages as needed.

The system supports this function by providing a 2000-character note pad for each appointment notes in the Family Record. The Notes are client specific.

### Automatic Recording of Appointment Attendance

The AIM WIC System assists staff in managing the scheduler by automatically marking appointments as kept or missed based upon other recorded clinic events, such as certification, printed notice of ineligibility, FI pick-up, etc.

On a nightly basis, the WIC System reviews all current clinic activity. This is a normal part of the end of day routine. Utilizing this process, the scheduler is automatically updated for missed/kept appointments based upon clinic events. For example, the presence of a certification record and corresponding food instrument would indicate that a client had come in for their initial certification visit.

### Maintain Additional Appointment Data

The Scheduler also provides several ancillary support features, (such as Language Indicators, Appointment Preferences, etc.).

Indicate Language Spoken

The WIC System displays an editing message within the Appointment Sheet referring to the language spoken by the family or staff member, allowing the scheduling clinic worker to respond to clients or staffs who do not speak English. The clinic has the opportunity to refresh the data and schedule an appointment for the family or staff with an individual speaking the same language. This is only done for those clients who do not utilize English as a primary or secondary language and who require the services of a translator.

Client Appointment Preferences

The WIC System captures and maintains client appointment day-of-the-week and time of day preferences. This data is utilized in creating appointments.

### *Maintain Schedule Integrity*

The data set associated with the appointment scheduler is checked out when data is transferred from the local agency into a satellite clinic environment. This means that the satellite clinic becomes the owner of that scheduling data and other local agency users cannot update it.

When a clinic is downloaded into a satellite clinic setting from the local agency server, the schedule must be “locked” against updating at the local agency. This is to prevent inappropriate updating of scheduling records since the master copy of the schedule will be utilized at the remote site.

### *Description of Appointment Scheduler Functions*

When selecting the Appointment Scheduler button from the Arizona WIC System Master Menu, the following menu will appear:

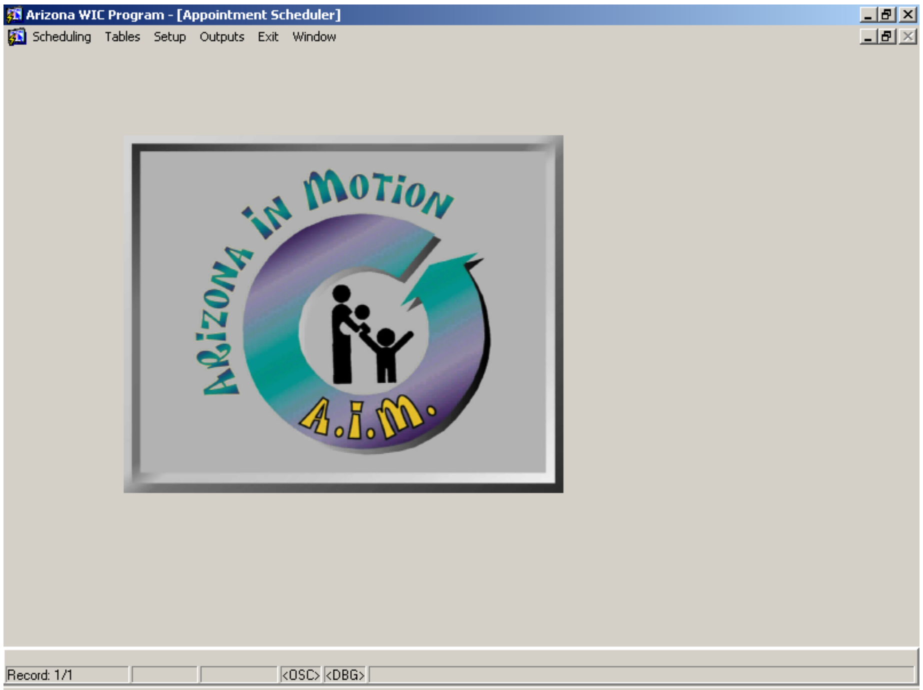


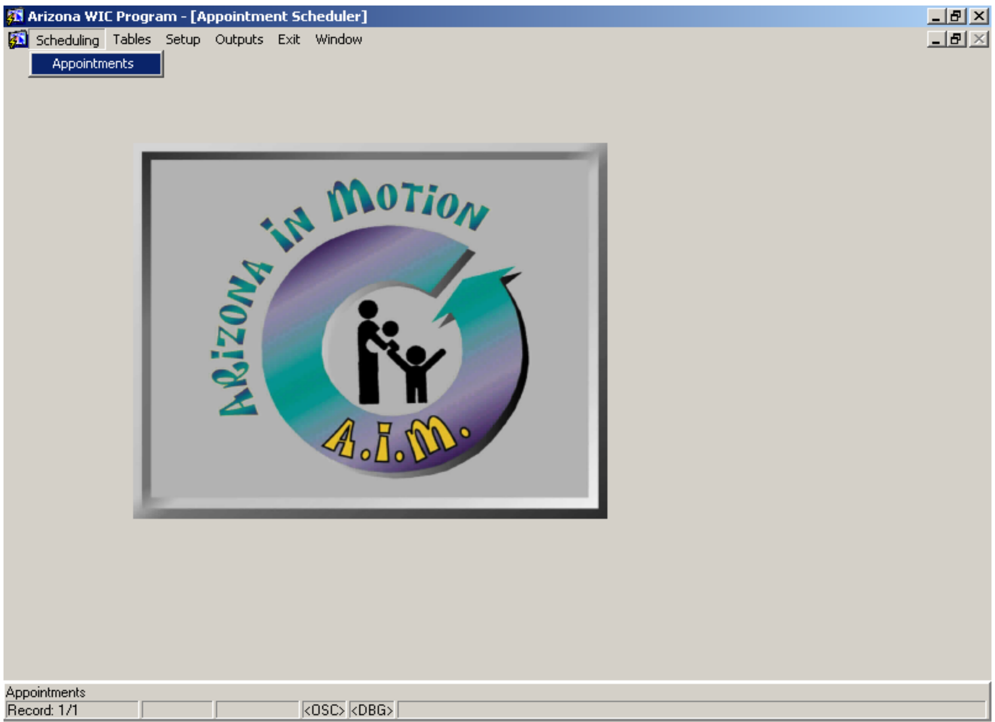

**Figure 1 - Appointment Scheduler Splash Screen**

# Appointments

## *Scheduling Appointments*

To Schedule Appointments:

1. Click on Scheduling from the menu bar.
2. Click on Appointments as shown below:



The Family Record Tab is displayed:

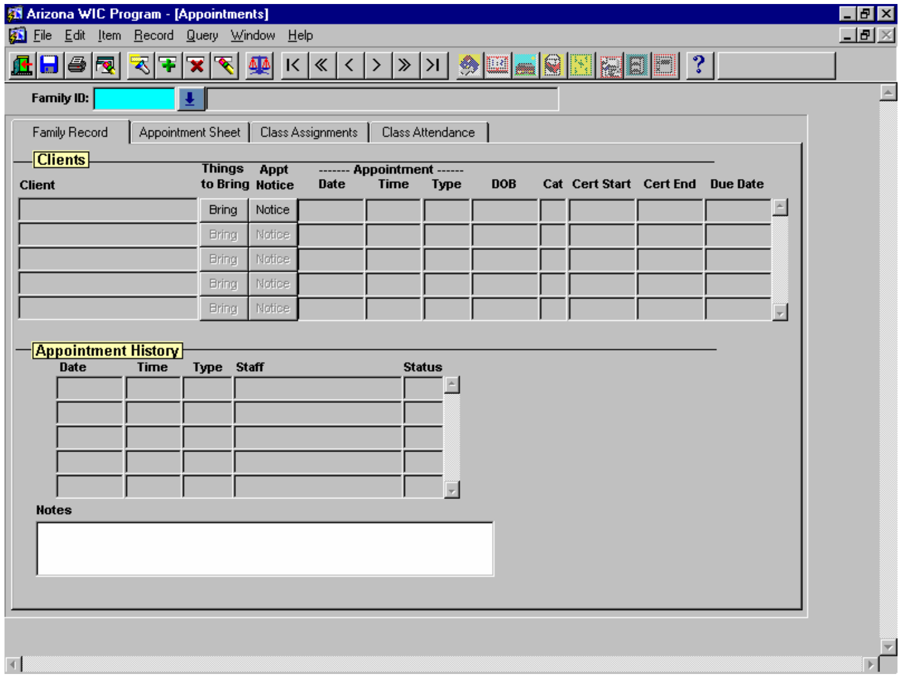



**Figure 2 – Appointments (1 of 2)**

Scheduling an Appointment

3. Enter the Family ID for the family belonging to the clinic the user is logged into, to schedule an appointment by either of the two following methods:
    - Enter the Family ID in the Family ID field and query the requested family, or
    - Double click on the blank Family ID field to jump to the Client/Family Lookup screen, and search for the family. Refer to that section in the Enrollment and Certification module for further information. Upon returning to the Family Record screen, the Family ID field will be populated based on the selection on the Client/Family Lookup screen.
4. Click the Appointment Sheet tab to schedule the family appointment.

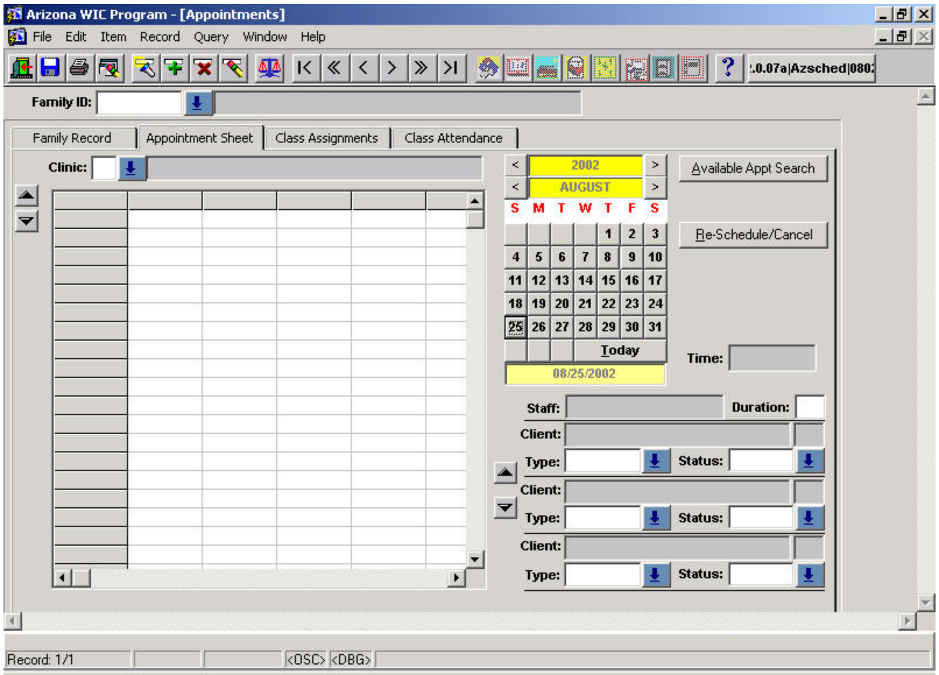



**Figure 3 – Appointments (2 of 2)**

5. Select the date for the appointment from the calendar located at the top right-hand side of the screen. The calendar contains the initials for the day of the week and the number keys.
   - Make sure that the year and the month displayed at the top of the calendar are correct by clicking on the left and right arrow buttons located on either side to move forward or backward through the months and years.
   - Select the day for the appointment by clicking on that date.
   - If the date of the appointment to be scheduled is today, simply click the Today button at the bottom of the calendar and the system will automatically schedule the current day.
6. The appointment sheet will automatically populate the hours of operation, the staff availability columns, and the services they provide within the hours they are available.
7. Click on a cell for the start time of the family appointment. The system will fill in the Family ID as well as the client information in the Family Information section located on the lower right side of the screen. The Family Information table, in view only, displays the clients and their categories within the family, the appointment start time, and the staff member the family will see.
8. The Type, Status, and Duration fields remain blank until a type of appointment is selected for each client within the family.
9. Select an appointment service type from the list of values button to the right of the Type field for each member of the family. The service that the staff provides must match the service requested for the client.
10. Each service/activity has a pre-set time internally programmed into the System during the calendar setup, and is displayed in the duration field.
11. The duration field is modifiable and the time can be increased or decreased based on the clinic appointment interval.

12. The duration determines the number of time slots to fill on the appointment sheet. The duration of each client's appointment type builds how much time will be needed for the family appointment in the Duration field.
13. The Status for each type of appointment defaults to Pending (P) for the future appointment. Upon selection, the status field will display Walk-In (W) for appointments scheduled on the current date for families that arrive to be seen without a scheduled appointment.
14. On the appointment sheet, hash marks in the cells under the family id are used to indicate how much time is required for the appointment. The number of hash marks may be increased or decreased based on the duration of the appointment.
15. Click the Save icon to keep the appointment.

    NOTE: If the appointment time is not desired, and the appointment has not been saved, then refresh the calendar by clicking on the calendar date for the same day or another day. This will clear the appointment sheet to start over with making the appointment.
16. Click the Family Record tab to return to the screen to confirm the family appointment.
    - If multiple appointments exist for the family, the earliest calendar date appointment will appear first.
    - Once the appointment expires, the next appointment appears in the family record screen.

17. To notify the client of what is needed for the appointment, click the Things to Bring push button. The system will display the following pop-up window:

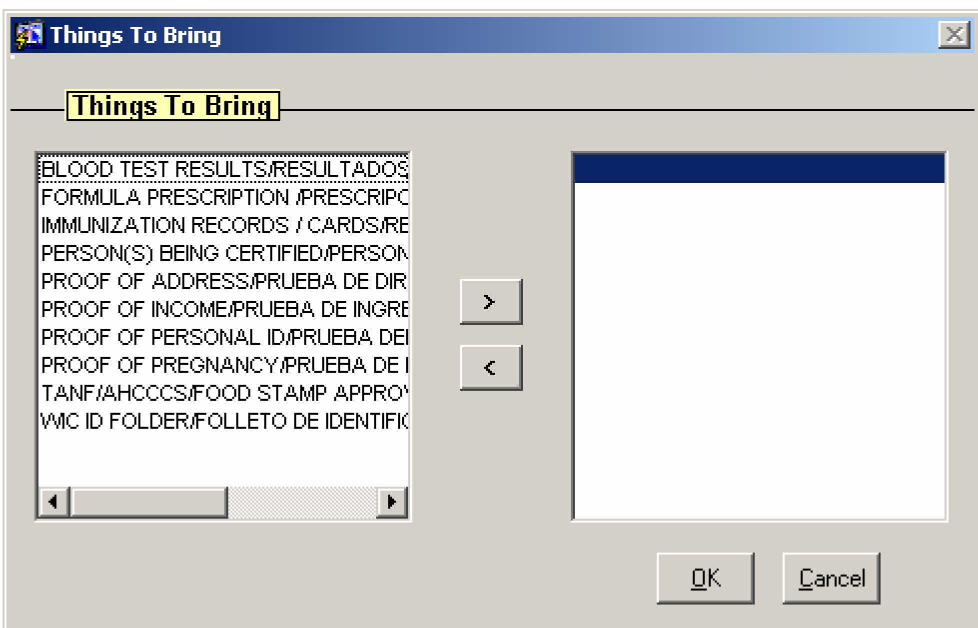



**Figure 4 – Appointments (Things to Bring Pop-Up)**

18. Select the items that the client should bring to the appointment by highlighting the selected item and clicking the right arrow key. Items to Bring are client specific within the family.
19. The Save prompt displays after each client is assigned Items to Bring.
20. Click the Appointment Notice push button. The system will display the following pop-up window:

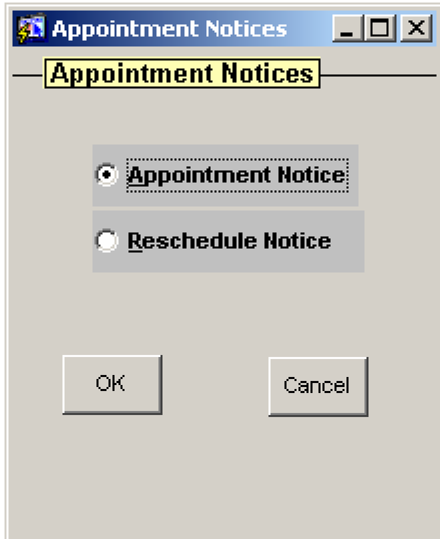



**Figure 5 - Appointments (Appointment Notices Pop-Up)**

21. Select the appropriate appointment notice radio button,
22. Click OK to automatically print the designated notice.
23. While this screen is displayed, click the Print icon on the toolbar to print the notice.
24. If none of the appointment notices are wanted, click on the Cancel button to return to the Family Record screen.
25. Notices print in both Spanish and English.

Scheduling an Appointment through the Available Appointment Search

1. Upon entering the Appointments screen tab, see figure 3 above, and enter the Family Id number for the family belonging to the clinic the user is logged into.
2. Click the List of Values button to the right of the Clinic field and select the clinic desired to schedule the family.
3. Click on the Available Appt. Search push button. The system will display the following pop-up window:

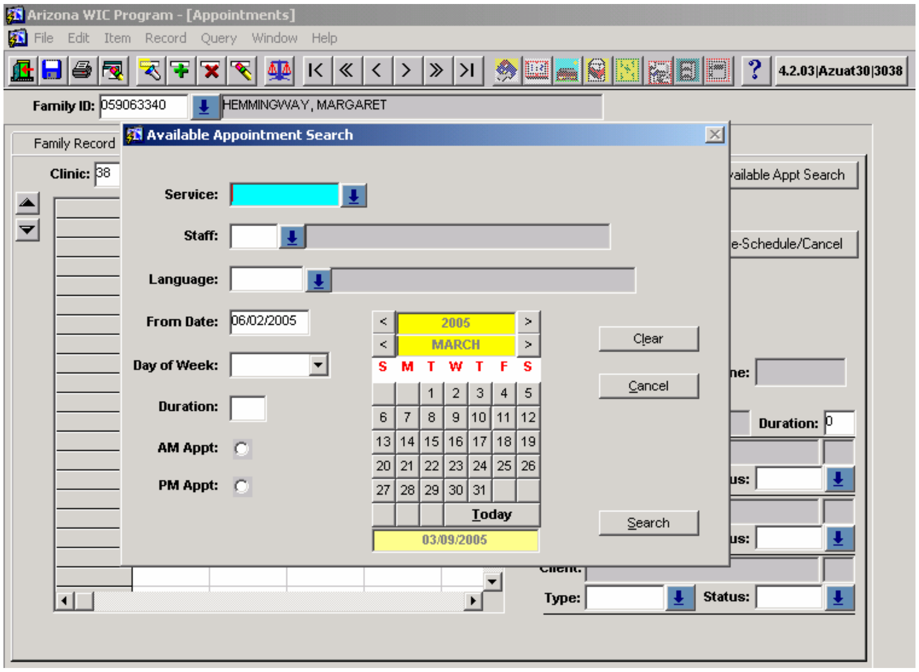



**Figure 6 - Appointments (Available Appointment Search Pop-Up)**

4. The Search criteria are all optional. A single field or multiple fields may be selected to perform the search.
5. Optionally, click the List of Values button to the right of the Service field and select the service to be scheduled for the family/client.
6. Optionally, click the List of Values button to the right of the Staff field and select the staff desired to process the family.
7. Optionally, click the List of Values button to the right of the Language field and select the language you wish to be used for scheduling the appointment.
8. Optionally, select the date from which to begin searching for the next available appointment on the calendar
9. Optionally, select the day of week from which to begin searching for the next available appointment on the calendar
10. Optionally, enter the duration of time required for the next available appointment on the calendar
11. Optionally, click either the A.M. or the P.M. radio button for the next available appointment on the calendar
12. Click the Search push button and the system will display the first available appointment according to the search criteria on the appointment sheet.
13. The Results the system displays is a highlighted green cell in the time slot for the first appointment available on the appointment sheet according to the search criteria. This appointment may be used, or use the available appointment search again to select a different time slot.

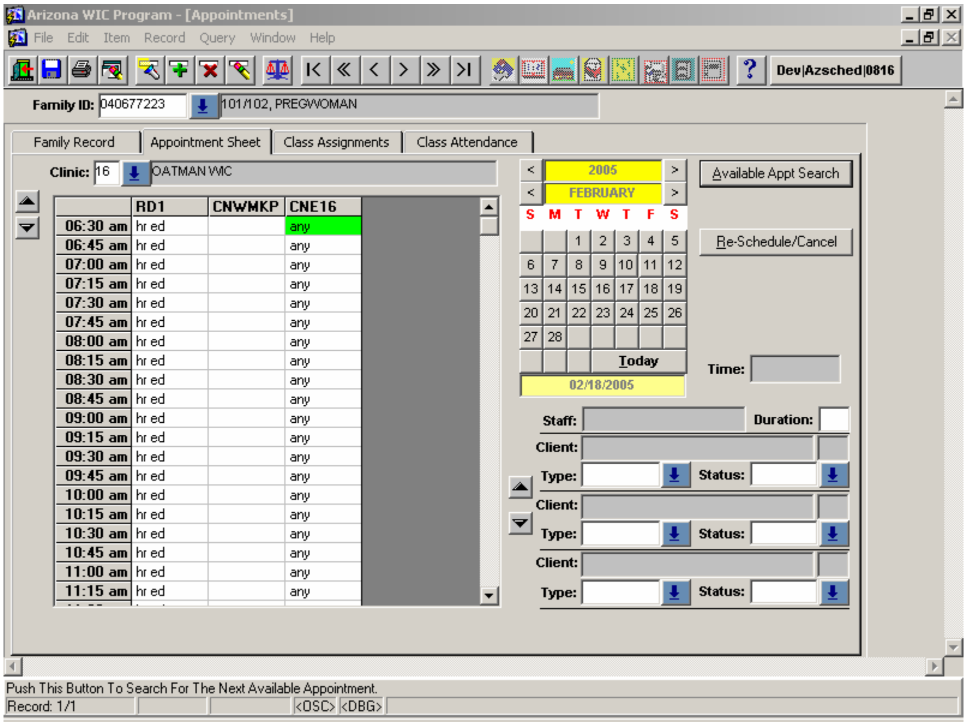


**Figure 7 - Appointment Sheet**

14. Complete the process of scheduling the appointment by clicking the designated cell, populating the Family ID and completing the Family Information section as described in the previous section, "Scheduling an Appointment."

### Scheduling an Appointment for a New Client/Family

1. The precertification process is mandatory to create an appointment for a potentially new participant. The family unit and each participant need ID numbers to link them to the **AIM** system in order to make an appointment.
2. Complete this screen (Cert Action - Precertification) per the instructions in the Enrollment and Certification module. If more than one family member is to be scheduled and certified at the same appointment, complete the information for all of these family members in the Applicant section at this time.
3. When the Precertification screen is completed, click the Save icon on the toolbar. The system will display the message: "Transaction Completed." Click on the OK button.
4. Click the Appt Scheduler push button to jump to the Appointment Sheet screen; the precertification Family ID number will be displayed in the Family Id field.
5. Complete the Appointment Sheet screen, printing notices, etc. as described in the section, Scheduling an Appointment.

### Reschedule a Family's Appointment

1. A family appointment may be rescheduled to a different time within the same day, or to another day same or different time, with the same staff member, or to a different staff member.
2. Query the Family ID in the Family Id field on the Family Record tab to view the Family appointment needing to be rescheduled.

3. Click the Appointment Sheet tab to carry over the Family Id and clinic information.
4. Select the calendar date for the scheduled appointment and scroll to find the appointment that matches the Family Id number.
5. Highlight the family id cell for the time slot of the appointment to be rescheduled.
6. Click once on the Reschedule/Cancel button. The system will display the following pop-up dialog box:

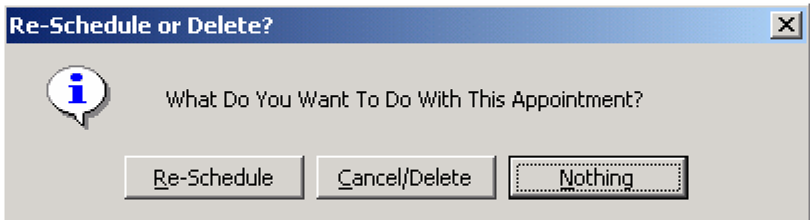



**Figure 8 – Re-schedule or Delete Dialog Box**

7. Click on the Re-Schedule push button
8. Select another time, and/or day, and/or staff person to reschedule the appointment and save. The client's appointments have successfully been rescheduled by service type to another date.
9. Click the Print and Reschedule buttons on the Family Record to generate Appointment Notices to inform clients' of the appointment changes.

Scheduling an Appointment from the Care Plan

1. From the Care Plan screen, click the Follow-up/Nutr-Ed push button. The system will display the following screen:

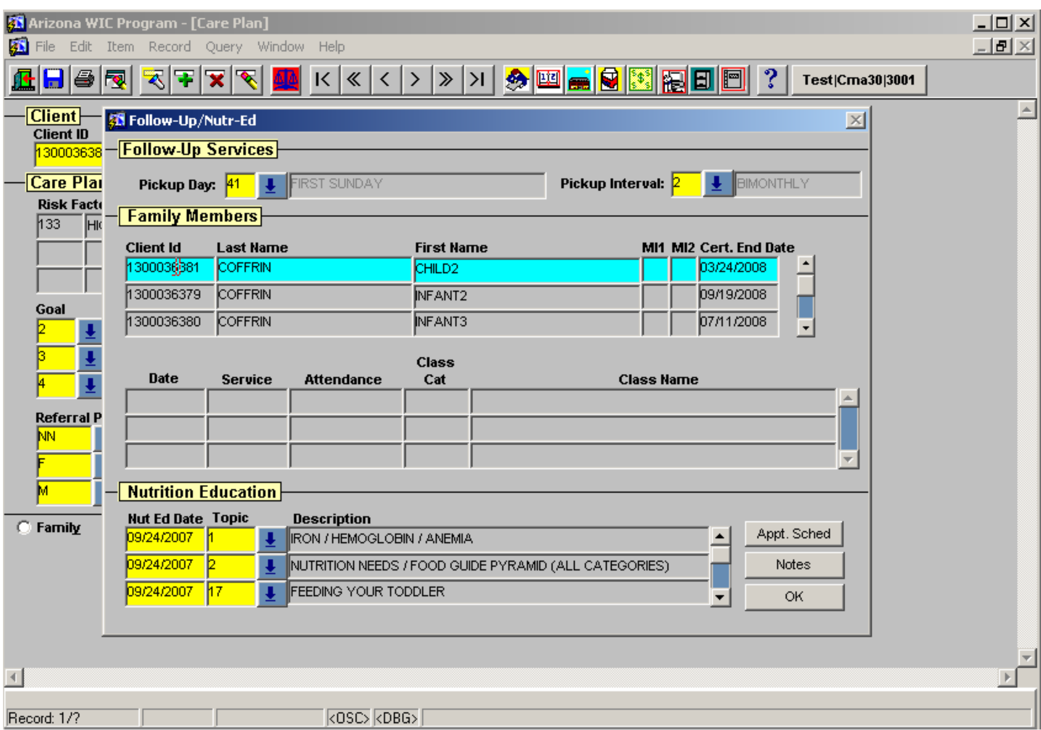



**Figure 9 – Appointments (Follow Up/Nutr. Ed. Pop-Up)**

2. Complete the fields on this screen following the directions in the Enrollment and Certification module.
3. Click the Appt. Sched. Push button and the system will display the Appointments window referenced in Figure 3 above.
4. Complete the Appointments screen, printing notices, etc. as described in the section, 'Scheduling an Appointment'.
5. Click on the Exit icon to return to the Care Plan.

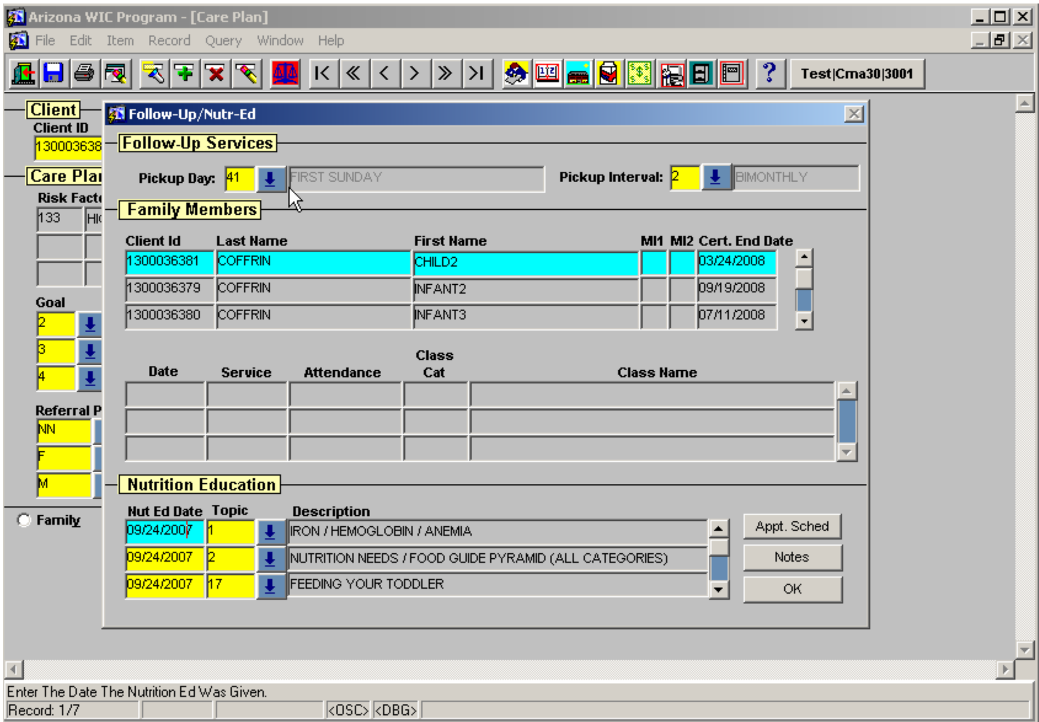



**Figure 10 - Appointments (Follow-Up Nutrition Education Pop-Up)**

6. The appointment displays for the client queried in the Care Plan screen.
7. Click OK to return to the enrollment and certification functions.

Scheduling an Appointment from the Food Package Screen

1. Complete the fields on the Food Package screen following the directions in the Enrollment and Certification module.

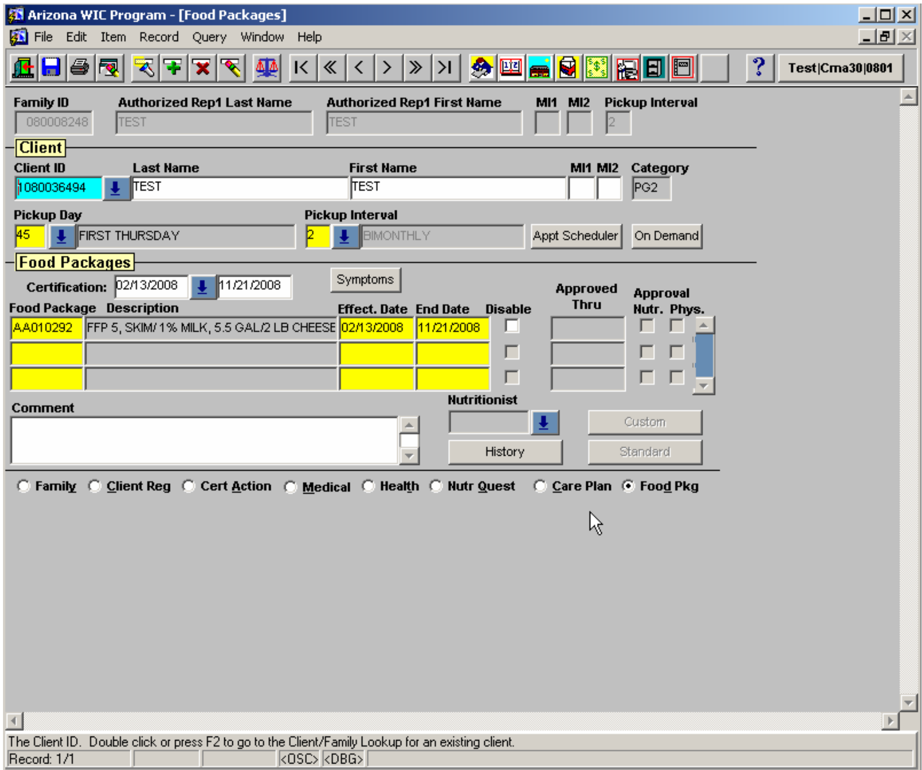



**Figure 11 - Appointment (Food Package Screen)**

2. Click the Appt. Scheduler push button and the system will display the Appointments window referenced in Figure 3 above.
3. Complete the Appointments screen, printing notices, etc. as described in the section, ‘Scheduling an Appointment’.
4. Click on the Exit icon to return to the Food Package screen.

Scheduling an Appointment from the On Demand Screen

1. Query the field information on the On Demand screen following the directions in the Food Instrument module.

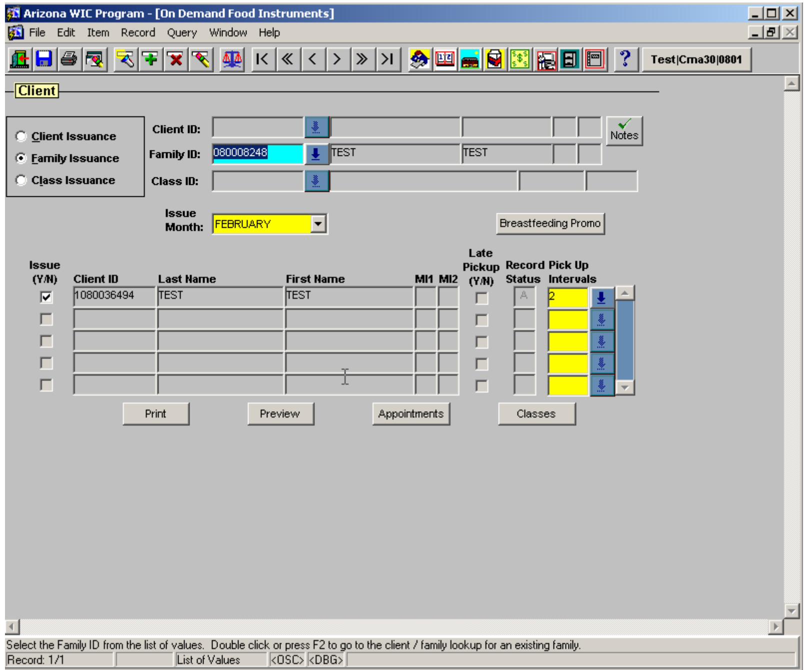



**Figure 12 - Appointments/Classes (On Demand Screen)**

2. Click the Appt. Scheduler push button and the system will display the Appointments window referenced in Figure 3 above.
3. Complete the Appointments screen, printing notices, etc. as described in the section, ‘Scheduling an Appointment’.
4. Click the Classes push button and the system will display the Class Assignments window referenced in Figure 17 – Class Assignments.
5. Complete the family assignment to a class as described in the section, “Add Families to Classes”.
6. Click on the Exit icon to return to the On Demand screen.

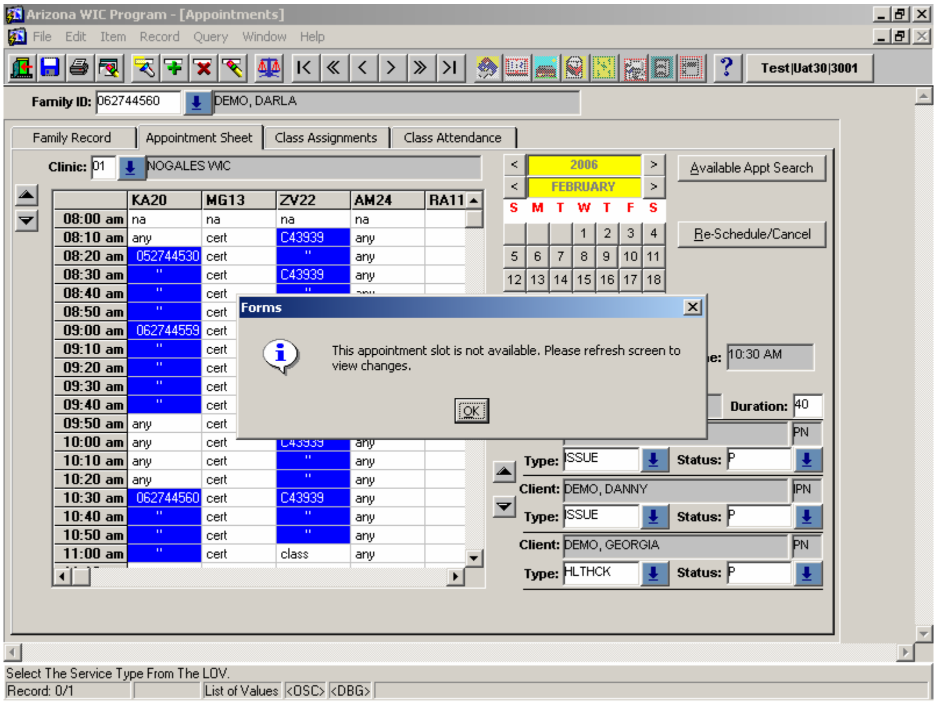


**Figure 13 – Appointment Sheet (Appointment Slot Not Available - 1 of 3)**

Modification for Two Appointments Created on the Same Appointment Slot and Saved Simultaneously

1. Enter a Family ID in the Family ID field on the Appointment Sheet.

2. Click a date on the calendar.

3. Click on an available appointment slot to schedule a family appointment.

4. Select an Appointment Type from the Client Detail section.

5. Another user accessing the appointment sheet and performing the same steps using the same date and time, and clicks the Save icon first will receive the Transaction Completed to a successful appointment created.

6. The first user clicks the Save icon, and receives the popup message that the appointment slot is not available, and to refresh the screen to view the updates to the appointment sheet.

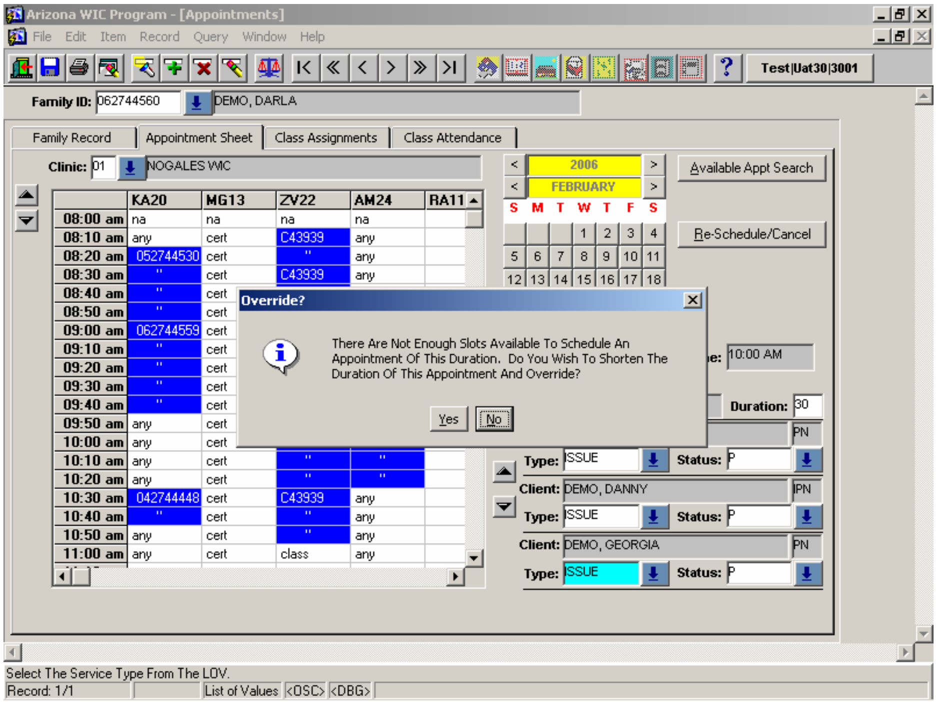


**Figure 14 – Appointment Sheet (Not Enough Slots – 2 of 3)**

1. Enter a Family ID in the Family ID field on the Appointment Sheet.
2. Click a date on the calendar.
3. Click on an available appointment slot to schedule a family appointment.
4. Select an Appointment Type from the Client Detail section.
5. Another user accessing the appointment sheet and performing the same steps using the an overlapping date and time, and clicks the Save icon first will receive the Transaction Completed to a successful appointment created.
6. The first user, assigned the AS_Override role, clicks the Save icon, and receives the popup message that there are not enough appointment slots available to schedule the appointment of this duration. The user with the AS_Override role has the option to shorten the appointment if possible and create the appointment, or the user has the option to search for another available time slot for the appointment.

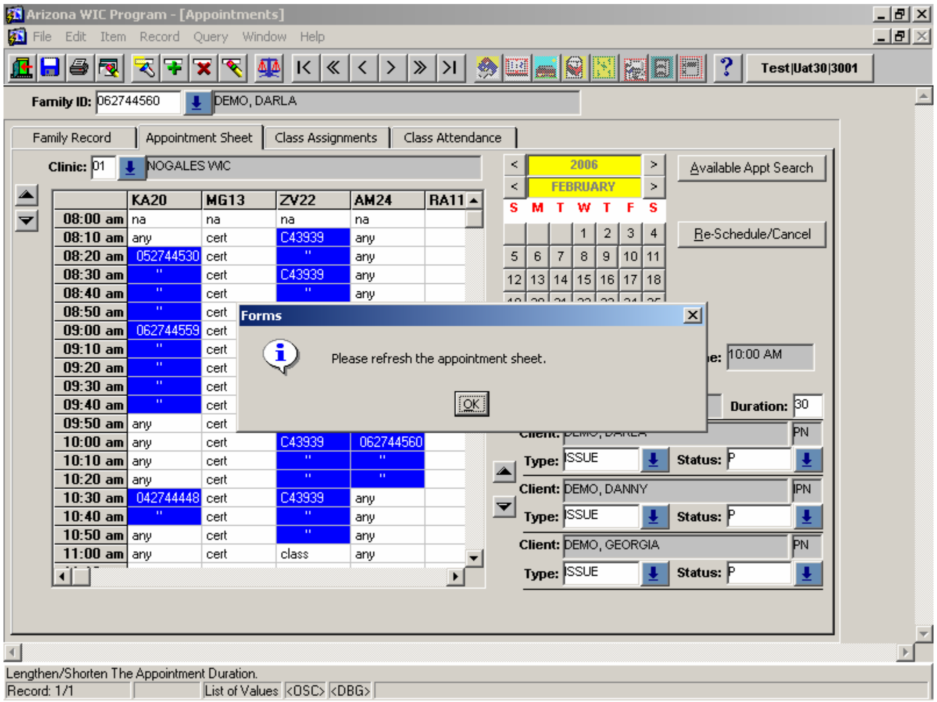


**Figure 15 - Appointment Sheet (Not Enough Slots – 3 of 3)**

7. Refresh the screen to view the updates to the appointment sheet.

*Figure 2 – Appointments (1 of 2)*

*Fields*

**Family ID -** A unique, system generated identifier for the family economic unit. This field may be populated when the Participant record is retrieved from the database. This field is mandatory.
**Client -** Displays the last and first name of the clients associated with the selected family ID. Deceased clients will display in bold red in this section. This field is display only.
**Appointment: Date -** The earliest appointment date will be displayed. This field is display only.
**Appointment: Time -** The scheduled appointment time. This field is display only.
**Appointment: Type -** The selected type of the appointment. This field is display only.
**DOB -** The date of birth for each client listed. This field is display only.
**CAT -** The category for each client listed. This field is display only.
**Cert Start -** The certification start date for each client listed. This field is display only.
**Cert End -** The certification end date for each client listed. This field is display only.
**Due Date** – If the client is pregnant, this field will display her due date. This field is display only.
**Date** – Displays the historical appointment dates. This field is display only.
**Time** – Displays the historical appointment times. This field is display only.
**Type** – Displays the type of each historical appointment. This field is display only.
**Staff** – Displays the staff member who performed the service. This field is display only.
**Status** – Displays the status of the historical appointment (kept, missed, deleted, rescheduled, walk-in). This field is display only.

*Push Buttons*

**Bring** – Displays the Things to Bring pop-up.
**Notice** – Displays the Appointment Notices pop-up

*Text Box*

**Notes** – Area for user to enter free flowing text.

*Figure 3 – Appointments (2 of 2)*

*Fields*

**Family ID -** A unique, system generated identifier for the family economic unit. This field may be populated when the Participant record is retrieved from the database. This field is mandatory.
**Clinic -** Clicking on this list of values button allows the user to select a clinic. This field is mandatory.
**Time -** This field displays the start time of the family appointment. This field is display only.
**Staff** – This field displays the staff member assigned to perform the selected service. This field is display only.
**Duration -** Displays the duration for the service selected. This field is modifiable.
**Client -** Displays the last and first name of the clients associated with the selected family ID. Deceased clients will display in bold red in this section. This field is display only.
**Type** – Clicking on the list of values allows the user to select the type of service to be performed. This field is mandatory.
**Status** – – Clicking on the list of values allows the user to select the status of the appointment. The default value is 'P' Pending/Future. This field is mandatory.

*Push Buttons*

**Calendar Buttons -** Press the date on the calendar for which the user would like to view appointments from.
**Today -** Press the Today button to select today as the date on which appointments will be scheduled.
**> -** Indicates advancing to the next month(s) and year(s).
**< -** Indicates navigating to the previous month(s) and year(s).

*Figure 4 – Appointments (Things to Bring Pop-Up)*

**OK -** Accepts the document selections.
**Cancel -** Cancels the document selections.
**> -** Selects the documents to bring
**< -** De-selects documents.

*Figure 5 - Appointments (Appointment Notices Pop-Up)*

**Appointment Notice -** This button produces a notice that informs the client of their appointment information.

**Reschedule Notice -** This button produces a notice to inform a client of an appointment being rescheduled based upon clinic circumstances.

*Push Buttons*

**OK -** Accepts the appointment notice selection.
**Cancel -** Cancels the appointment notice selection.

*Figure 6 - Appointments (Available Appointment Search Pop-Up)*

*Fields*

**Service -** Clicking on this list of values button allows the user to select a service. This field is optional.
**Staff -** Clicking on this list of values button allows the user to select a staff member to perform service. If no staff member is selected, all available staff members are eligible for the search. This field is optional.
**Language** – Clicking on this list of values button allows the user to select the language. This field is optional.
**From Date** – Enter date to begin the search. This field defaults from the last printed food instrument. This field is optional.
**Day of Week** – Select the day to make the search on. This field is optional.
**Duration** – Enter duration of time for the appointment. This field is optional.

*Radio Buttons*

**AM Appointment -** Select the radio button to Search for morning appointments. This is optional.
**PM Appointment -** Select the radio button to Search for afternoon appointments. This is optional.

*Push Buttons*

**Clear** – Clears search form.
**Cancel -** Exits the user from the Available Appointment Search pop-up to the Appointment Sheet.
**Search** – Executes the search query.
**Calendar Buttons -** Press the date on the calendar for which the user would like to view appointments from.
**Today -** Press the Today button to select today as the date on which appointments will be scheduled.

*Figure 8 – Re-schedule or Delete Dialog Box*

*Push Button(s)*

**Re-Schedule** – This button enables the local agency schedulers to reschedule family appointments to another day.
**Cancel/Delete** – This button will either cancel or delete the selected appointment.
**Nothing** – This button will not perform any further action.

*Figure 9 – Appointments (Follow Up/Nutr. Ed. Pop-Up)*

*Fields*

**Pickup Day** – The pickup day of the follow up services. The user clicks the list of values to select the code identifying the week and the day the family will pick up food instruments. This field is mandatory.
**Pickup Interval** – The user clicks the list of values to select on what basis the family is issued food instruments (monthly, bimonthly, trimonthly). This field is mandatory.
**Client ID** – ID number for the client. The client id field is populated based on the members of the family. This field is display only.
**Last Name** – Last name of the client automatically retrieved according to the Client ID number. This field is display only.
**First Name** – First name of the client automatically retrieved according to the Client ID number. This field is display only.
**MI1** – Middle initial of the client automatically retrieved according to the Client ID number. This field is display only.
**MI2 -** Second middle initial of the client automatically retrieved according to the Client ID number. This field is display only.
**Cert End Date** – This field displays the client's end date of their certification period. This is populated from the Cert Action screen. This field is display only.
**Date** – This field displays future (pending), present, and past appointments created in the Appointment Sheet. This field is display only.
**Service** – This field displays the type of appointment the client requires. This field is display only.
**Attendance** – This field displays the attendance status of the appointment. This field is display only.
**Class Cat.** – This field displays the class category for the class the client is scheduled to attend. This field is display only.
**Class Name** – This field displays the name of the class the client is scheduled to attend. This field is display only.
**Nut Ed Date –** This field defaults to the current date and is modifiable. The date nutritional education topics were discussed with the client.
**Topic** – This field displays the nutrition education topic discussed with the client. The topic selected from the list of values. This field is modifiable.
**Description** – This field displays the name of the nutrition education topic selected from the list of values. This field is display only.

*Push Button(s)*

**Appt Sched** – The user clicks this button to navigate to the appointment sheet of the appointment scheduler module.
**Notes** – The user clicks this button to create notes for the client. These notes are saved and added to the client's record.
**OK** – The user clicks this button to exit from the Follow Up Nutrition Education screen and returns to the Care Plan.

*Figure 13 – Appointment Sheet (Appointment Slot Not Available - 1 of 3)*

*Push Button(s)*

**OK** – Closes the popup message and returns the user to the Appointment Sheet.

*Figure 14 – Appointment Sheet (Not Enough Slots – 2 of 3)*

*Push Button(s)*

**Yes** -The selection displays a message that the slot is not available, and closes the popup, to return another popup requiring a refresh of the calendar. The popup closes and returns the user to the appointment sheet. The user must select another appointment slot to create the appointment.

**No** - The selection clears the Family Id from the slot so the user can select another slot for the appointment. The popup closes and returns the user to the Appointment Sheet.

*Figure 15 - Appointment Sheet (Not Enough Slots – 3 of 3)*

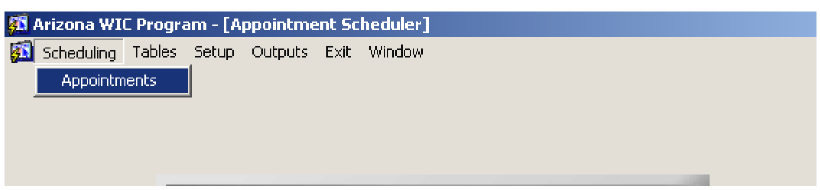
*Push Button(s)*

**OK** – Closes the popup message and returns the user to the Appointment Sheet.

### *Scheduling Classes*

To Schedule Class Appointments:

1. Click on Scheduling from the menu bar.
2. Click on Appointments as shown below:




The Family Record Window is displayed:

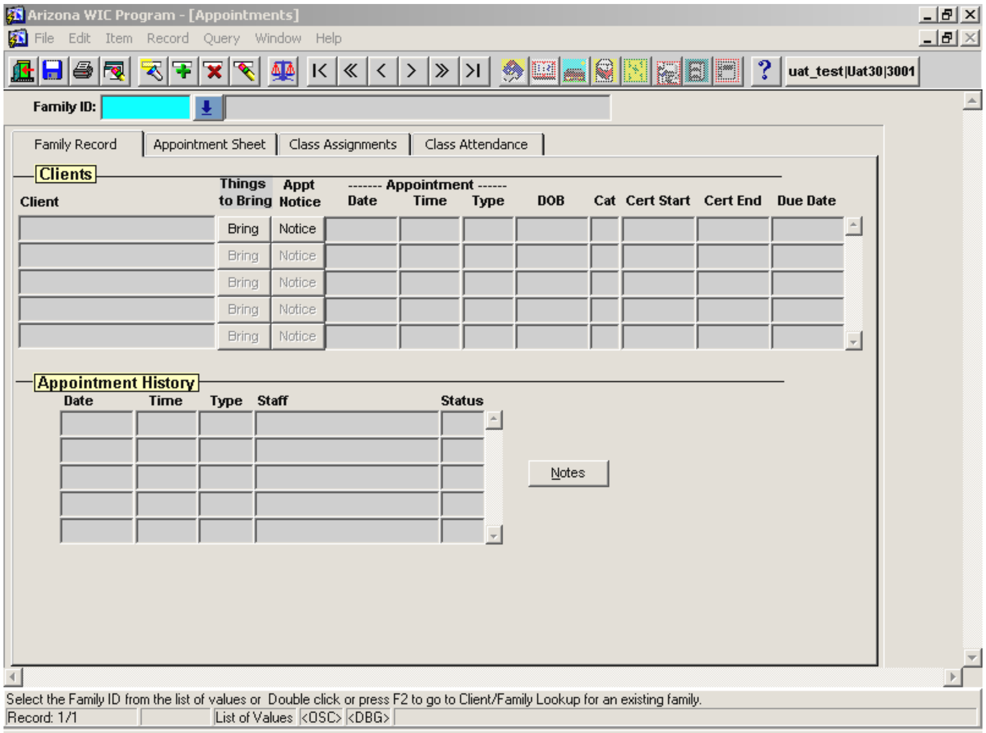



**Figure 16 – Family Record**

3. Enter the Family ID for the family belonging to the clinic the user is logged into, and tab to retrieve the family information.
4. Click the Class Assignments tab to search for a class to schedule the family into. The family information carries over to each tab.

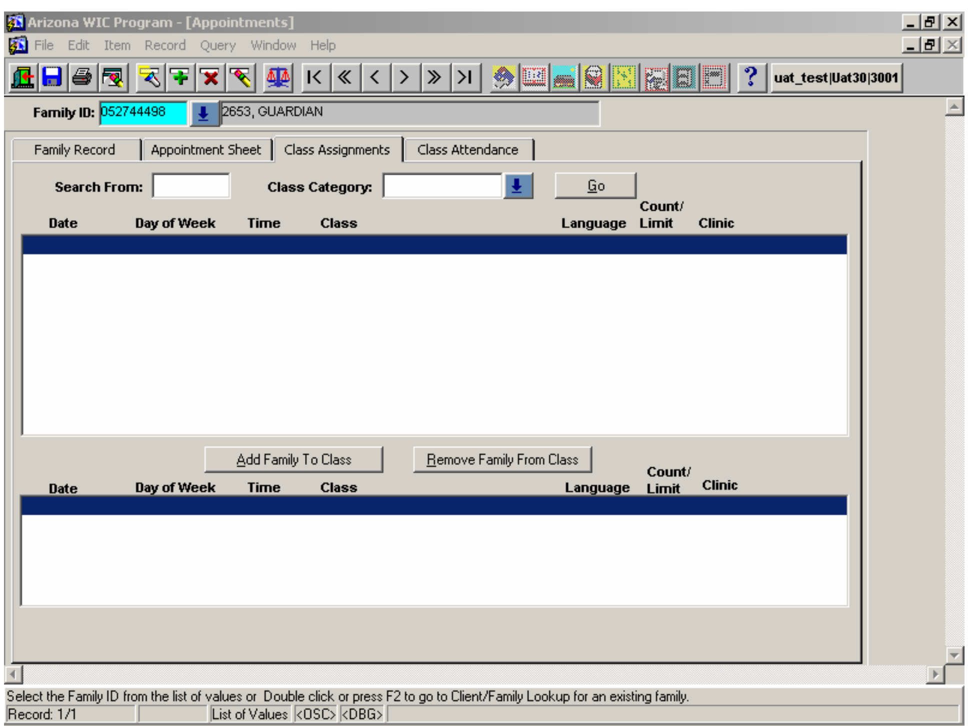


**Figure 17 – Class Assignments**

Add Families to Classes

1. Press the TAB to move the cursor to the "Search From" field.
2. Enter a date in the Search From field to narrow down the search for the list of classes. The date must be formatted as follows: MM/DD/YYYY. Or double click in the Search From field to retrieve the calendar and click on a date to search from.
3. To narrow the search more, Press the TAB key to move the cursor to the Class Category field, then select a category of classes from the list of values drop down. Otherwise leave blank to produce a comprehensive list of classes.
4. Press the TAB to move the cursor to the "GO" push button and click "GO".
5. The screen will populate with all of the classes being offered in the clinic starting from the date entered in the Search From field.
6. The classes are identified by the Date and day of the week, and time the class is being offered, as well as the name of the class, the language spoken during the class, the number of spaces available for families and the limit of families the class can hold, and the clinic offering the class.
7. Once a class has been identified to schedule into, click on the row of the class to select.
8. There are two ways to assign the family into the class. Once the row of the class has been selected, click the Add Family to Class push button.

OR

9. Double click on the selected row to add the family to the class.
10. Either way, the lower portion of the screen displays the families added to the class.
11. The date, day of week, time, class name, language, count/limit, and clinic indicate which class the family has been assigned to.
12. Click Save to complete the transaction.

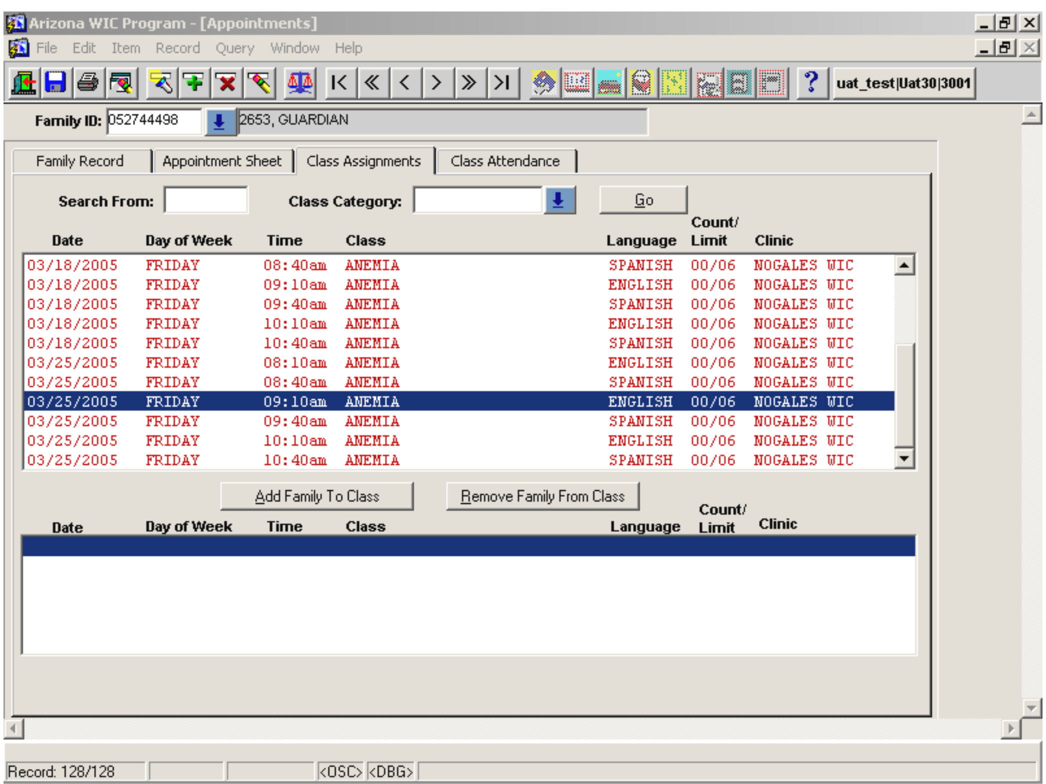


**Figure 18 - Class Assignments - Search Results**

Remove a Family From a Class

1. At the moment of selecting a class, the class chosen is not the desired class to be scheduled; the family may be removed from the class.
2. With the family id information still displayed in the Family ID field, highlight the class information of the class the family is scheduled into, located in the bottom portion of the screen.
3. There are two ways to Remove a Family from a Class. It is the same process as Adding a Family to a Class. Once the row of the class has been selected, click the Remove Family from Class push button.

   OR

4. Double click on the selected row to remove the family from the class.
5. The family is no longer assigned to a class. To reselect a new class, perform the steps to Add a Family to a Class.
6. Click Save to complete the transaction.

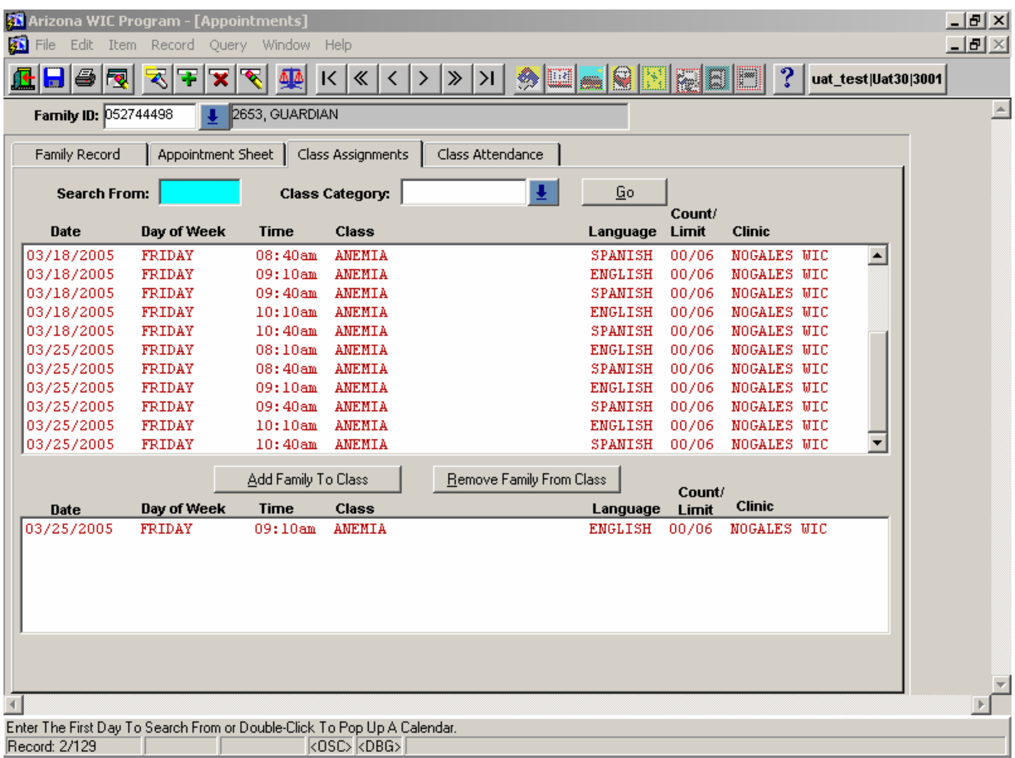



**Figure 19 - Class Assignments - Add Family to Class**

*Fields*

**Family ID -** A unique, system generated identifier for the family economic unit. This field may be populated when the Participant record is retrieved from the database. This field is mandatory.

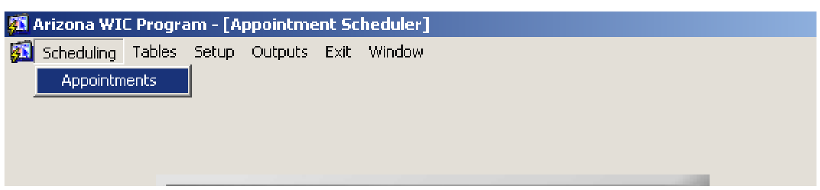
**Search From -** The date the list of Nutrition Education Class appointments is to begin the search is entered here by the user. This field is optional.
**Class Category-** Clicking on this list of values allows the user to select the Category criteria name to have the system search those specific classes. This field is optional
**Date -** The Dates of the Nutrition Education Class appointments are displayed here as a result of the search. This is display only.
**Day of Week-** The day of the week the class is offered as a result of the search. This is display only.
**Time** - The starting times of the Nutrition Education Class appointments are displayed here as a result of the search. This is display only.
**Class** - The Nutrition Education Class names are displayed here as a result of the search. This is display only.
**Language –** The language spoken for the offered Nutrition Education class. This is display only.
**Count/Limit –** The count of families registered for the class cannot exceed the limit of families allowed for the class. This field is display only.
**Clinic –** The class is offered in the clinic displayed. This field is display only.

*Push Button(s)*

**Go –** The push button is used to find and list the clinic's classes either with or without the search parameters.
**Add Family to Class –** The push button used to schedule a family into a class.
**Remove Family from Class -** The push button used to cancel a family from a class.

To View Class Appointments:

1. Click on Scheduling from the menu bar.
2. Click on Appointments as shown below:




The Family Record Window is displayed:

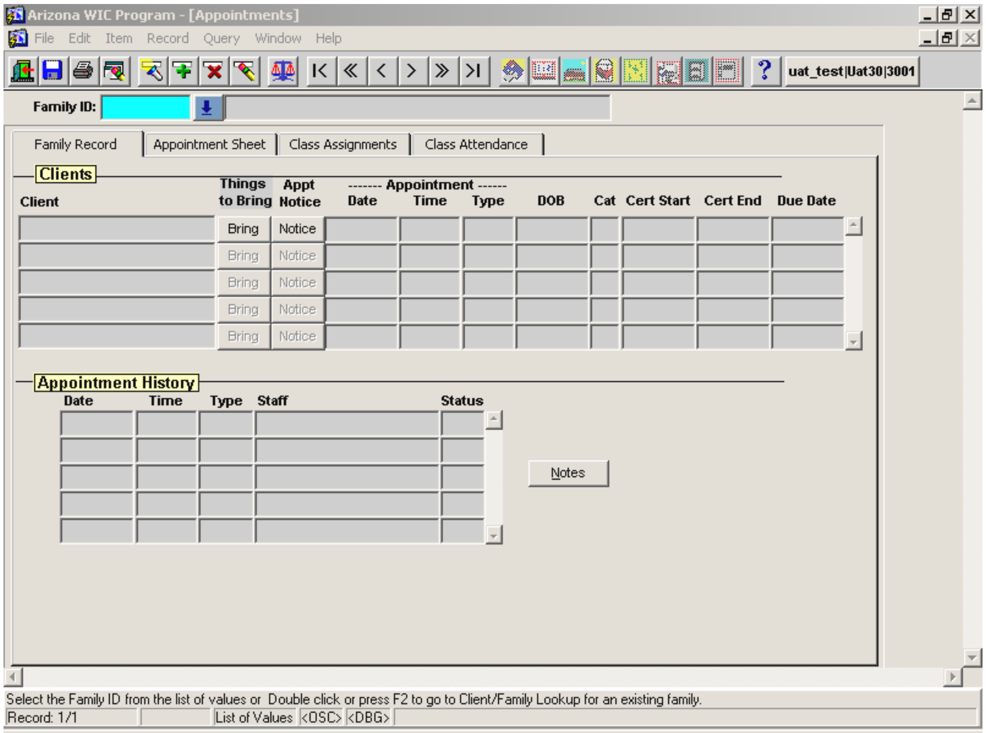



**Figure 20 - Family Record**

3. Click on the Appointment Sheet tab.
4. Select the clinic from the list of values.
5. Click the date on the calendar to search for a class offered.
6. Locate a class on the appointment sheet.
7. Click on the cell containing the class id number.
8. The name of the class appears in the hint text.

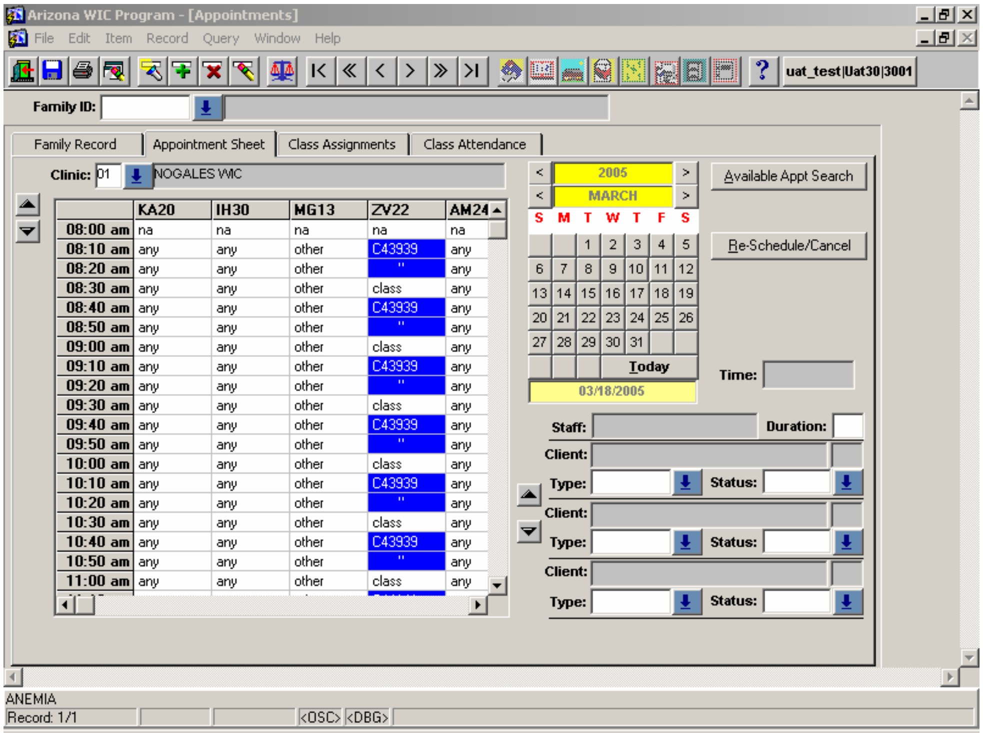


**Figure 21 - Appointment Sheet**

Mark the Status of the Family Class Appointment:

1. With the class id cell highlighted on the Appointment Sheet, click the Class Attendance tab.
2. The window displays the families scheduled for the class.

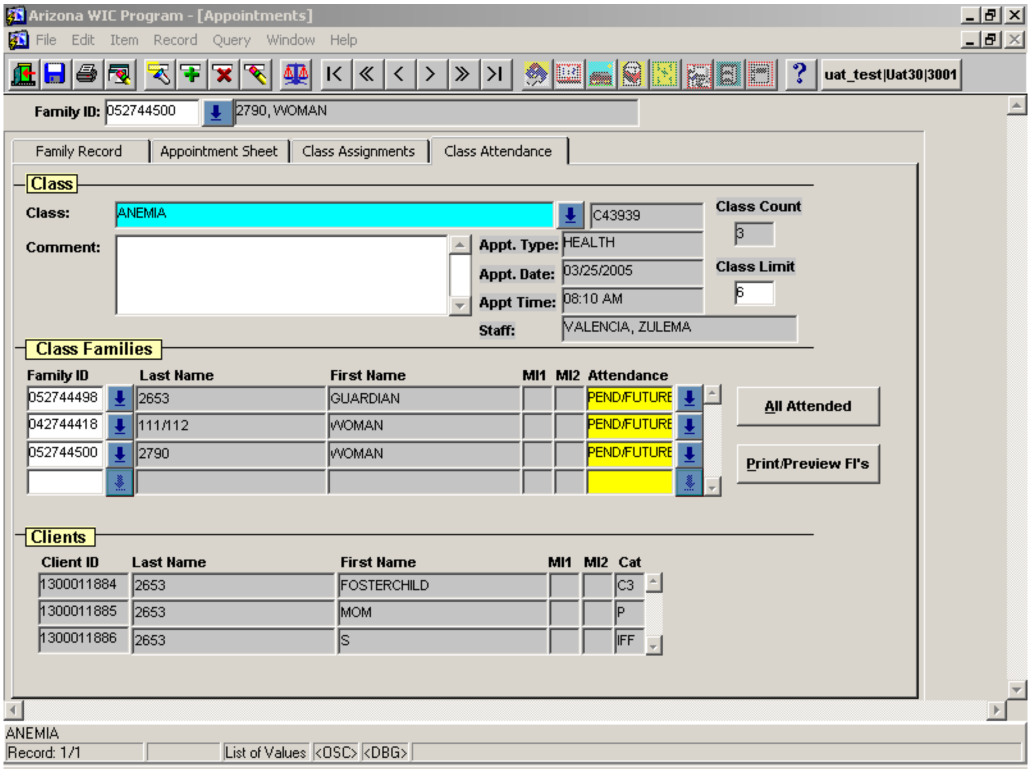



**Figure 22 - Class Attendance**

3. For the current day’s class, mark the attendance of each family scheduled using the list of values.
4. If all families scheduled, those belonging to the clinic the user is logged into, have kept the class appointment, click the All Attended push button and the system will automatically mark the Attendance Status field with Kept.
5. Click the Save icon.

To Print Food Instruments for a Class:

1. Click the Print/Preview FI’s push button to jump to the Class Food Instrument screen.
2. Each food instrument related to the family record can be viewed and printed in this screen.
3. The Issue Month defaults to the current issue month.
4. Clients eligible to receive food instruments have a checkmark next to their client information.
5. Click the Preview push button to view the food instruments for the group of clients.
6. Click the food instrument Print push button to complete a group print for the families that have attended the class.

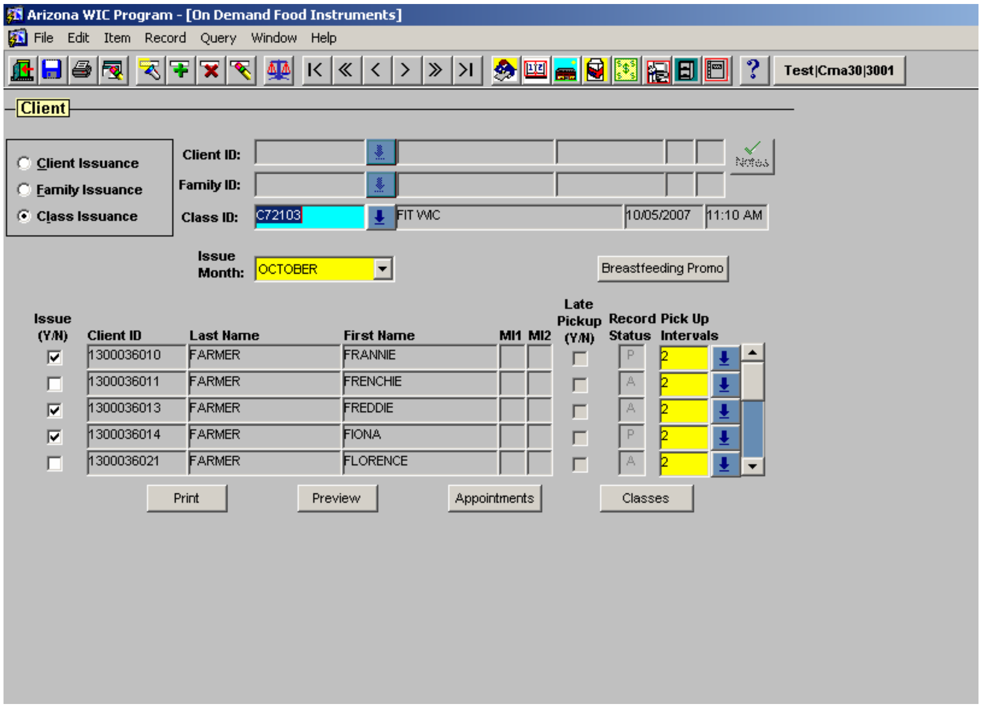


**Figure 23 - Print/Preview Class FI's**

7. Click Save to complete the transaction.

To Delete a Family From a Class:

1. With the class id cell highlighted on the Appointment Sheet, click the Class Attendance tab.
2. The window displays the families scheduled for the class.
3. In the section Class Families, click the family id for the row of information to be deleted from the class.
4. Click the Delete icon in the toolbar to remove the family from the class.
5. Click the Save icon to complete the transaction.
6. Click the Family Record tab to view the deleted family class appointment in the Appointment History.

To Delete A Class:

1. With the class id cell highlighted on the Appointment Sheet, double click on the Class ID.
2. The message “Are you sure you want to delete this class?” displays.

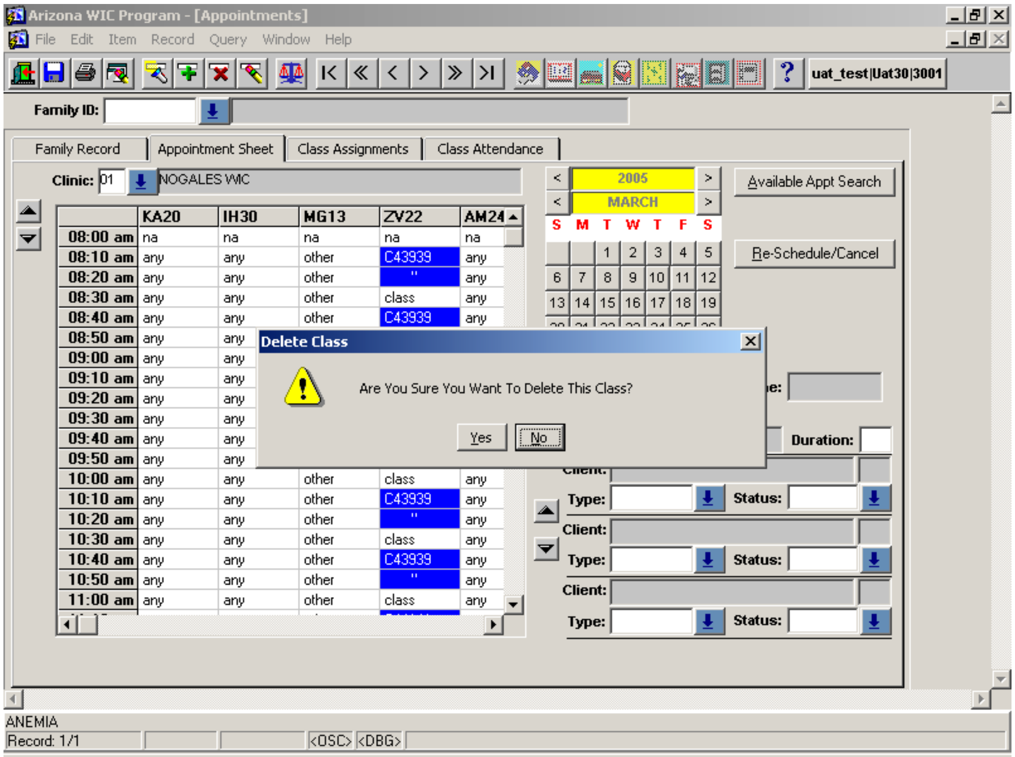


**Figure 24 - Appointment Sheet - Delete Popup**

3. Click the Yes push button to complete the deletion of the class from the Appointment Sheet.
4. If the class does not contain any scheduled families appointments, the deletion will be complete.
5. Click Save to complete the transaction.

   OR

6. If the class does contain scheduled family appointments, the system displays a message that the class cannot be deleted due to scheduled class appointments.

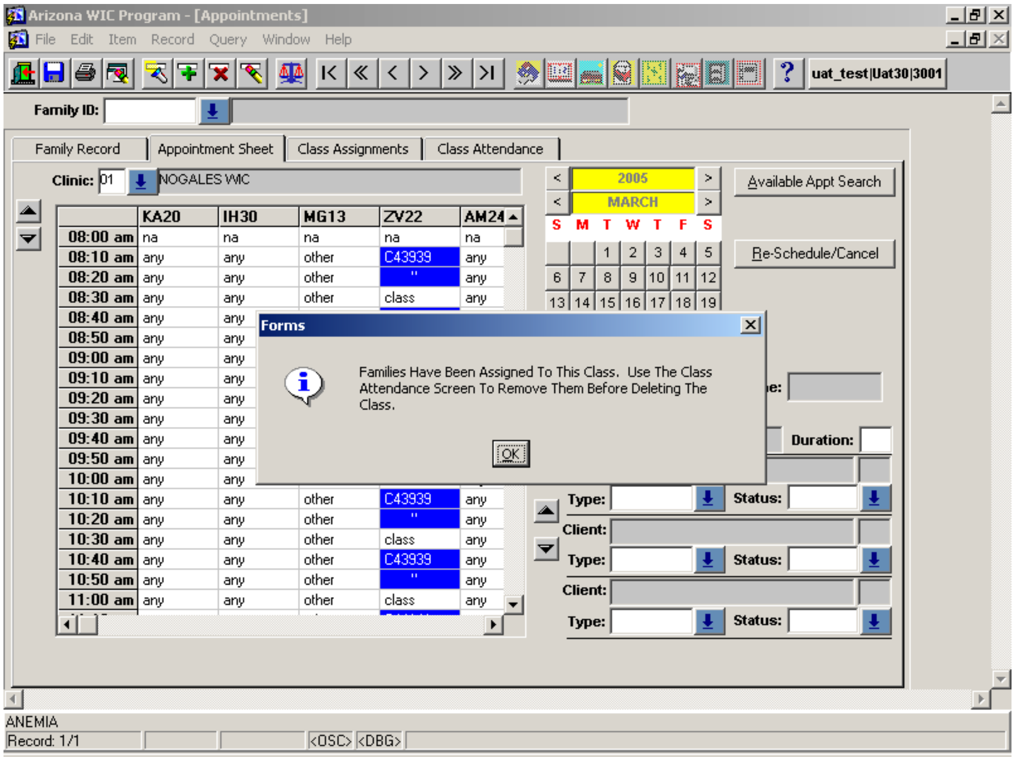


**Figure 25 - Appointment Sheet - Families Assigned to Class Popup**

7. Delete the families from the class prior to deleting the class using the directions for Deleting a Family from a Class.
8. Once the families have been removed from the class to delete, return to the Appointment Sheet and proceed with steps 1 – 5 for deleting a class.

*Figure 22 - Class Attendance*

*Fields*

**Family ID** – A unique, system generated identifier for the family economic unit. This field may be populated when the Participant record is retrieved from the database. This field is optional.
**Class** – The name of the Nutrition Education Class is displayed using the list of values button or when navigating from the class on the appointment sheet. This field is mandatory.
Once the field is populated the Class Id number displays in the field next to the name of the class. This field is display only.
**Comment** – A free form text field where the user may provide any comments or remarks. This field is optional.
**Appt. Type** – The class category the class was created under. The class category is attached to the class designation in the Classes screen during Setup. This field is display only.
**Appt. Date –** The date the class is offered in the format of mm/dd/yyyy. The date is a result of the class being published in the Schedule Class Day screen during Setup. This field is display only.

**Appt. Time** – The time the class is offered in the format of HH:MM and A.M. or P.M. The time is applied to the class during the Setup of the class in the Class Day screen. This field is display only.
**Staff** – The name of the staff person assigned to teach the class. The staff is assigned to the class during the Setup of the class in the Class Day screen. This field is display only.
**Class Count -** The count of families registered for the class that cannot exceed the limit of families allowed for the class. This field is display only.
**Class Limit** – The maximum number of families that can be scheduled for the offered class. The class limit is assigned to the class during the Setup of the class in the Class Day screen. This screen is modifiable to increase or decrease the amount of allowable families in a class. The modification of this field is reflected in the Class Assignments screen.
**Family ID** – A unique, system generated identifier for the family economic unit. This field may be populated when the Participant record is retrieved from the database. This field is required.
**Last Name -** The last name of the authorized representative. This field is display only.
**First Name -** The first name of the authorized representative. This field is display only.
**MI 1 -** The first middle initial of the authorized representative. This field is display only.
**MI 2 -** The second middle initial of the authorized representative. This field is display only.
**Attendance** –The status of the family class appointment as listed in the list of values button. It can be entered manually or selected from the list of values. The field will default to Pending/Future, but can be overridden. This field is mandatory.
**Client ID -** The unique identification number to identify a Participant. This field is display only.
**Last Name -** The last name of the Participant. This field is display only.
**First Name -** The first name of the Participant. This field is display only.
**MI 1 -** The first middle initial of the Participant. This field is display only.
**MI 2 -** The second middle initial of the Participant. This field is display only.
**Category -** The category of the Participant. This field is display only.

*Push Button(s)*

**All Attended –** If all families have attended the class, the use of this push button will allow the system to automatically mark the attendance for all of the scheduled families as 'Kept'. This is optional.
**Print/Preview FI's -** The button is used to retrieve the Print/Preview Class FI's screen to group print for the class. This is optional.

*Figure 23 - Print/Preview Class FI's*

*Fields*

**Client ID -** Double-clicking this brings up the Client/Family Lookup window that allows the user to select a client identification number. The user can also select participants from a list of values. This entry is mandatory. The Client Last Name, First Name and Middle Initials are also shown.
**Family ID** – Double clicking this brings up the Client/Family lookup window that allows the user to select a Family ID number. The user can also select Families from a list of values. This field is mandatory if Family Issuance is selected.
**Class ID** – Click the list of values button to select the appropriate class id by name, time, and date of the class. This field is mandatory if Class Issuance is selected.
**Last Name -** The last name of the client selected or all clients in the family/economic unit. This field is display only.
**First Name -** The first name of the client selected or all clients in the family/economic unit. This field is display only.

**MI 1 -** The first middle initial of the client selected or all clients in the family/economic unit. This field is display only.
**MI 2 -** The second middle initial of the client selected or all clients in the family/economic unit. This field is display only.
**Issue Month -** The month of first date to use. This field is mandatory. The month represents the first month of bimonthly or tri-monthly issuance is done. This field is mandatory and comes from a list box.
**Client ID -** This field is a display only of the client selected or all clients in the family/economic unit.
**Last Name -** The last name of the client selected or all clients in the family/economic unit. This field is display only.
**First Name -** The first name of the client selected or all clients in the family/economic unit. This field is display only.
**MI 1 -** The first middle initial of the client selected or all clients in the family/economic unit. This field is display only.
**MI 2 -** The second middle initial of the client selected or all clients in the family/economic unit. This field is display only.
**Record Status -** This display only field tells whether the participant record is Active (A), Complete with no errors, or Pending (P), Incomplete or containing errors.
**Pick Up Intervals -**The pick up interval for picking up checks. This field is mandatory and is selected from the drop down list.

*Check Box(es)*

**Issue (Y/N) -** The system automatically checks this box if the client is eligible to be issued food instruments. If a user checks it, a message is displayed detailing the reasons why issuance will not occur.
**Late Pickup (Y/N) -** Clicking on this box allows local agency personnel to override the State proration policy and issue a full food package.

*Radio Button(s)*

**Client Issuance -** If this radio button is clicked when the Client ID field is entered/selected, only that particular Client identification and name will appear in the list below the Issue Month field.
**Family Issuance -** If this radio button is clicked when the Client ID field is entered/selected, all participants with the same family identification will appear in the list below the Issue Month field.
**Class Issuance** – If this radio button is clicked when the Class ID field is entered/selected, only class assigned particular Client identification and name will appear in the list below the Issue Month field.

*Push Button(s)*

**Notes** – This button allows is disabled with the use of Class Issuance.
**Breastfeeding Promo** – This button allows the user to select breastfeeding promotional items to give to the client.
**Preview -** This button allows the user to preview the food instruments before printing.
**Print -** This button allows the user to print the food instrument On Demand. A window will appear for verification of starting serial numbers.
**Appointments** – This button brings the user to the Appointments screen in the Appointment Scheduler module

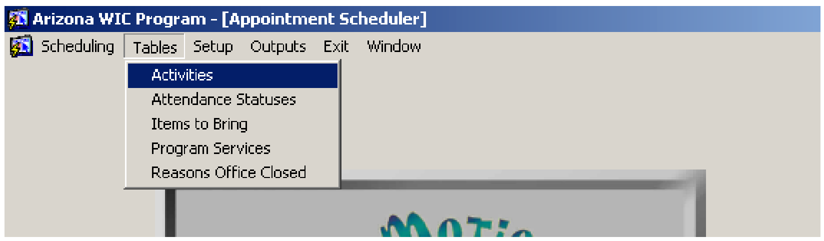
**Classes** – This button brings the user to the Class Assignments screen in the Appointment Scheduler module

# Tables

## *Maintain Activities Table*

To Maintain the Activities Table:

1. Click on Tables from the menu bar.
2. Click on Activities as shown below:




The Maintain Activities Window is displayed:

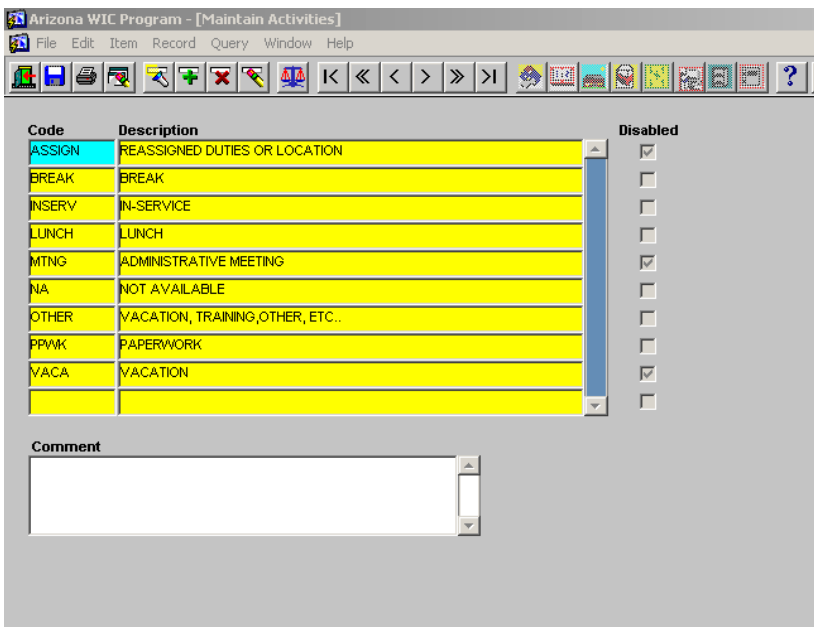



**Figure 26 - Maintain Activities**

Add an Activity

1. The system will default the cursor to highlight the code letters under the first entry in the Code field. Next to it will be displayed the Description of that Activity. If there are any comments recorded in the system that relate to this, the system will display them under the Comment field.
2. Click the Insert Record icon and the system will create a blank space under the Code and Description fields to add a new Activity.
3. In the Code field, enter a logical abbreviation of letters for the new Activity to be entered. If the letters chosen are already in use for another Activity, the system will display a pop-up

window indicating: “This Activity Code already exists.” Click on the OK button, delete the Code letters inserted, and enter a different abbreviation.

4. Press the TAB key so that cursor highlights the corresponding Description blank. Enter the description of the new Activity, then press the TAB key again and enter any correct comment information.
5. The Disabled column is a display only column of checkboxes that may or may not be marked. The checked checkboxes indicate Activities no longer used in the appointment scheduler. Activities no longer being used will have to be updated by CMA development.
6. Click the Save icon. The system will display a pop-up window indicating: “Transaction Completed.” Click on the OK button and a new Activity and a comment to go with it have been successfully added into the system.

Update an Activity

1. Click the Enter Query icon. The system will now automatically clear the Code, Description and Comment fields.
2. The cursor will default to the first blank under the Code fields. Type the Code letters of the Activity to be updated into this first blank. If the Code letters of the Activity to be updated are unknown, presses the TAB key once until the cursor moves to the Description field and enter the description of the type, then press the F8 key.
3. The system will insert any code, description, or comment information related to that Activity into the correct fields.
4. Press the TAB key once and the cursor will move to the Description field. Enter or delete any information to be updated.
5. Press the TAB key once and the cursor will move to the Comment field. Enter or delete any information to be updated (*Note: The system will not allow updates to the Code itself. If attempted, the system will indicate: “Field is protected against update.”)*
6. Click the Save icon. The system will display a pop-up window indicating: “Transaction Completed.” Click on the OK button and an Activity has successfully been updated.

Delete an Activity

1. Click the Enter Query icon. The system will now automatically clear the Code, Description and Comment fields.
2. The cursor will default to the first blank under the Code fields. Type the Code letters of the Activity to be deleted into this first blank. If the Code letters of the Activity to be deleted are unknown, press the TAB key once until the cursor moves to the Description field and enter the description of the title, then press the F8 key.
3. The system will insert any code, description, or comment information related to that Activity into the correct fields.
4. Verify that the Code, Description, and Comment information being displayed now are the ones to be deleted. After verifying this, click the Remove Record icon.
5. The system will now delete the record from the screen, leaving the fields blank. Click on the Save icon.
6. The system will now display a pop-up window indicating: “Transaction Completed.” Click on the OK button and an Activity has successfully been deleted.
7. To verify that the deletion has worked successfully, repeat steps 1-3 above. If the deletion was successful, after pressing the F8 key, the system will display the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

*Figure 26 - Maintain Activities*

*Fields*

**Code -** A code for an activity. This field is mandatory.
**Description -** A user entered description of the activity. This field is mandatory.
**Comment -** The user may provide any comments or remarks. This field is optional.

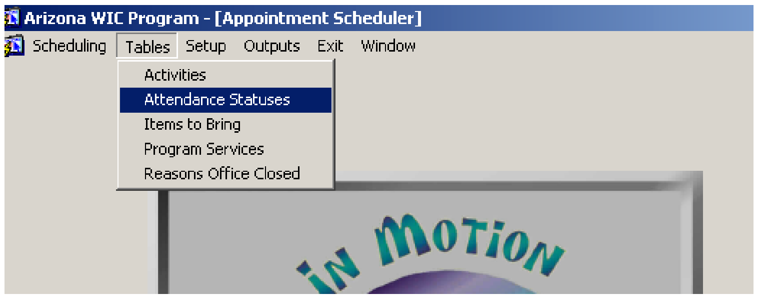
Checkbox (es)

**Disabled** – A default checkmark updatable by CMA development when activities are no longer in use or the checkmark is removed when activities become active again. This field is display only.

### *Maintaining Attendance Statuses*

To Maintain the Attendance Statuses:

1. Click on Tables from the menu bar.
2. Click on Attendance Statuses as shown below:




The Maintain Attendance Statuses window is displayed:

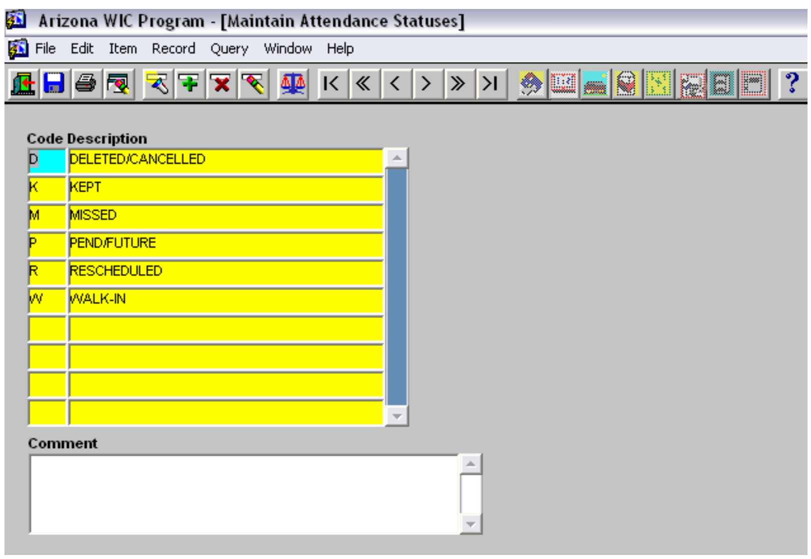



**Figure 27 - Attendance Status**

Add an Attendance Status

1. The system will default the cursor to highlight the code letter under the first entry in the Code field. Next to it will be displayed the Description of that Status. If there are any comments recorded in the system that relate to this, the system will display them under the Comment field.
2. Click the Insert Record icon and the system will create a blank space under the Code and Description fields to add a new Status.
3. In the Code field, enter a logical abbreviation of letters for the new Status to be entered. If the letter chosen is already in use for another Attendance Status, the system will display a pop-up window indicating: "Attendance Status exists already with same Code." Click on the OK button, delete the Code letter inserted, and enter a different letter.

4. Press the TAB key so that cursor highlights the corresponding Description blank. Enter the description of the new Attendance Status, then press the TAB key again and enter any correct comment information.
5. Click the Save icon. The system will display a pop-up window indicating: “Transaction Completed.” Click on the OK button and a new Attendance Status and a comment to go with it, have been successfully added into the system.

Update an Attendance Status

1. Click the Enter Query icon. The system will now automatically clear the Code, Description and Comment fields.
2. The cursor will default to the first blank under the Code fields. Type the Code letter of the Attendance Status to be updated into this first blank. If the Code letter of the Attendance Status to be updated is unknown, press the TAB key once until the cursor moves to the Description field and enter the Attendance Status description, then press the F8 key.
3. The system will insert any code, description, or comment information related to that Activity into the correct fields.
4. Press the TAB key once and the cursor will move to the Description field. Enter or delete any information to be updated.
5. Press the TAB key once and the cursor will move to the Comment field. Enter or delete any information to be updated (Note: The system will not allow updates to the Code itself. If attempted, the system will indicate: “Field is protected against update”).
6. Click the Save icon. The system will display a pop-up window indicating: “Transaction Completed.” Click on the OK button and an Attendance Status has successfully been updated.

Delete an Attendance Status

1. Click the Enter Query icon. The system will now automatically clear the Code, Description and Comment fields.
2. The cursor will default to the first blank under the Code fields. Type the Code letter of the Attendance Status to be deleted into this first blank. If the Code letters of the Attendance Status to be deleted are unknown, press the TAB key once until the cursor moves to the Description field and enter the description of the status, then press the F8 key.
3. The system will insert any code, description, or comment information related to that Attendance Status into the correct fields.
4. Verify that the Code, Description, and Comment information being displayed now are the ones to be deleted. After verifying this, click the Remove Record icon.
5. The system will now delete the record from the screen, leaving the fields blank. Click on the Save icon.
6. The system will now display a pop-up window indicating: “Transaction Completed.” Click on the OK button and an Activity has successfully been deleted.
7. To verify that the deletion has worked successfully, repeat steps 1-3 above. If the deletion was successful, after you press the F8 key, the system will display the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

*Figure 27 - Attendance Status*

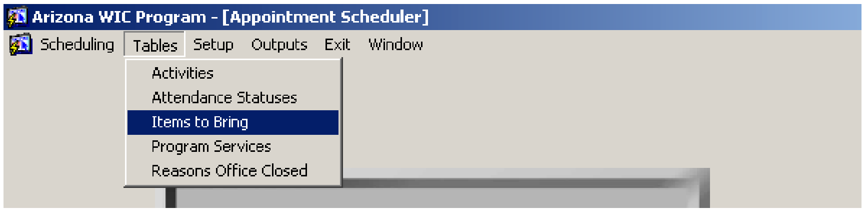
*Fields*

**Code -** A code to correspond to an attendance status. This field is mandatory.
**Description -** A description to correspond to the status code. This field is mandatory.
**Comment -** The user may provide any comments or remarks. This field is optional.

### *Maintaining Items to Bring*

To Maintain the Items to Bring:

1. Click on Tables from the menu bar.
2. Click on Items to Bring as shown below:




The Maintain Items to Bring Window is displayed:

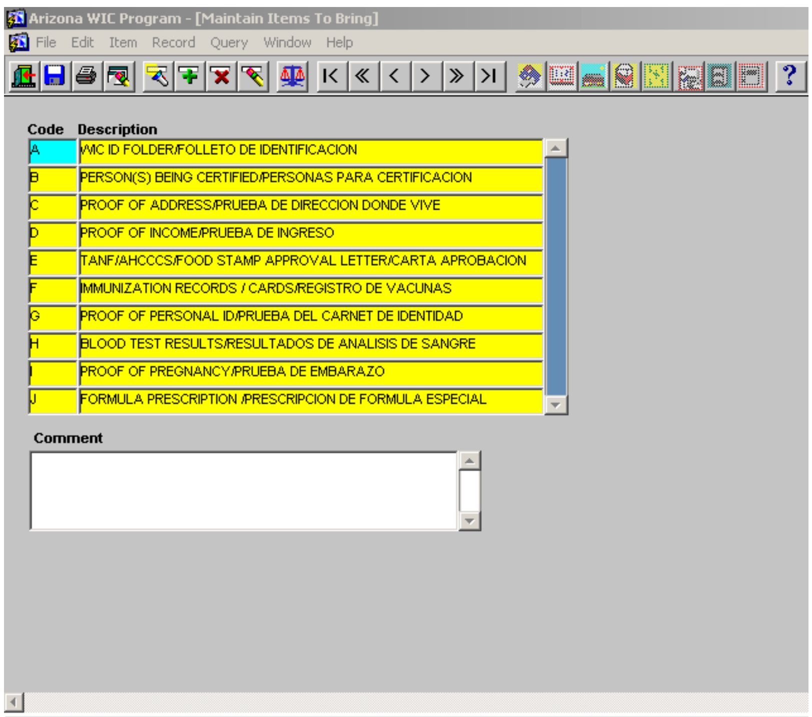



**Figure 28 - Maintain Items to Bring**

Add Items to Bring

1. The system will default the cursor to highlight the code letter under the first entry in the Code field. Next to it will be displayed the Description of that Item to Bring. If there are any comments recorded in the system that relate to this item, the system will display them under the Comment field.
2. Click the Insert Record icon and the system will create a blank space under the Code and Description fields to add a new Item.
3. In the Code field, enter the next logical letter for the new Item to be entered. If the letter chosen is already in use for another Item, the system will display a pop-up window

indicating: “This Appointment item already exists.” Click on the OK button, delete the Code letter inserted, and enter a different letter.
4. Press the TAB key so that cursor highlights the corresponding Description blank. Enter the description of the new Item, then press the TAB key again and enter any correct comment information.
5. Click the Save icon. The system will display a pop-up window indicating: “Transaction Completed.” Click on the OK button and a new Attendance Status and a comment to go with it have successfully been added into the system.

Update an Item to Bring

1. Click the Enter Query icon. The system will now automatically clear the Code, Description and Comment fields.
2. The cursor will default to the first blank under the Code fields. Type the Code letter of the Item to Bring to be updated into this first blank. If the Code letter of the Item to be updated is unknown, press the TAB key once until the cursor moves to the Description field and enter the Item description, then press the F8 key.
3. The system will insert any code, description, or comment information related to that Item into the correct fields.
4. Press the TAB key once and the cursor will move to the Description field. Enter or delete any information to be updated.
5. Press the TAB key once and the cursor will move to the Comment field. Enter or delete any information to be updated (Note: The system will not allow updates to the Code itself. If attempted, the system will indicate: “Field is protected against update”).
6. Click the Save icon. The system will display a pop-up window indicating: “Transaction Completed.” Click on the OK button and an Item to Bring has successfully been updated.

Delete an Item to Bring

1. Click the Enter Query icon. The system will now automatically clear the Code, Description and Comment fields.
2. The cursor will default to the first blank under the Code fields. Type the Code letter of the Item to Bring to be deleted into this first blank. If the Code letter of the Item to be deleted is unknown, press the TAB key once until the cursor moves to the Description field and enter the description of the item, then press the F8 key.
3. The system will insert any code, description, or comment information related to that Item to Bring into the correct fields.
4. Verify that the Code, Description, and Comment information being displayed now are the ones to be deleted. After verifying this, click the Remove Record icon.
5. The system will now delete the record from the screen, leaving the fields blank. Click on the Save icon.
6. The system will now display a pop-up window indicating: “Transaction Completed.” Click on the OK button and an Item to Bring has successfully been deleted.
7. To verify that the deletion has worked successfully, repeat steps 1-3 above. If the deletion was successful, after pressing the F8 key, the system will display the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

*Figure 28 - Maintain Items to Bring*

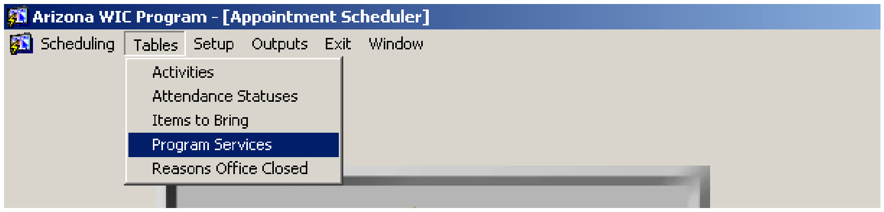
*Fields*

**Code -** the user creates the codes for items to bring.  This field is mandatory.
**Description -** The user enters the description of the Items to Bring.  This field is mandatory.
**Comment -** The user may provide any comments or remarks.  This field is optional.

## *Maintaining Program Services*

To Maintain Program Services:

1. Click on Tables from the menu bar.
2. Click on Program Services as shown below:




The Maintain Program Services Window is displayed:

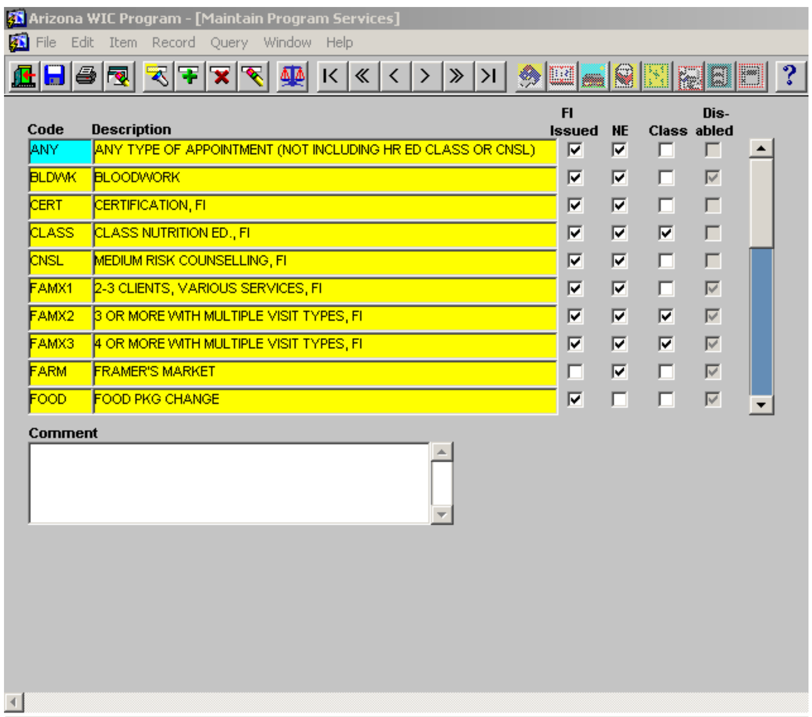



**Figure 29 - Maintain Program Services**

Add a Program Service

1. Click on the next available blank space under the Code field, and then enter the abbreviation letters given to the Program Service being added.
2. TAB to the Description field, and then enter the name of the Program Service being added.
3. Click once in the corresponding FI issued check box if food instruments are issued with this service.
4. Click once in the corresponding NE check box if the service being added includes a Nutrition Education program.
5. Click once in the corresponding Class check box if the service being added is only offered to a class group, and not on an individual basis.

6. The Disabled column is a display only column of checkboxes that may or may not be marked. The checked checkboxes indicate Program Services no longer used in the appointment scheduler. Services no longer being used will have to be updated by CMA development.
7. Click once in the Comment field to record any information that is related to the Program Service being added.
8. After the completion of entering all the information for the new Program Service, click the Save icon. The system will indicate: “Transaction Completed.” Click the OK button and a Program Service has successfully been added.

#### Update a Program Service

1. Click the Enter Query icon. The system will automatically clear the Code, Description and Comment fields.
2. The cursor will default to the Code field. Type in the Code of the Program Service to be updated. If the Code is unknown, TAB to the Description field and type in the description. Press the F8 key to execute the query.
3. The system will insert any Code, Description or Comment data available for that Program Service.
4. Click on the field containing the information to be updated. If it is the Description or Comment fields, delete any unwanted information and enter the new information. If information in the FI Issued, NE or Class check boxes is to be changed, simply click on the box to either add or remove the check mark.
5. Click the Save icon and the system will indicate: “Transaction Completed.” Click the OK button and a Program Service has successfully been updated (Note: The Code may not be directly updated. To update this field, first delete Program Service, then add a new Program Service).

#### Delete a Program Service

1. Click the Enter Query icon. The system will automatically clear the Code, Description and Comment fields.
2. The cursor will default to the Code field. Type in the Code of the Program Service to be deleted. If the Code is unknown, TAB to the Description field and type in the description. Press the F8 key to execute the query.
3. The system will insert any Code, Description or Comment data available for that Program Service.
4. Verify that the Code, Description, or Comment information being displayed is the ones to be deleted.
5. Click the Remove Record icon, and the system will automatically delete that Program Service from the screen.
6. Click the Save icon and the system will indicate: “Transaction Completed.” Click the OK button and a Program Service has successfully been deleted.
7. To verify that the deletion has worked successfully, repeat steps 1 through 3 above. If the deletion was successful, after pressing the F8 key, the system will display the following message: “Query caused no records to be retrieved. Re-enter.”

*Figure 29 - Maintain Program Services*

#### Fields

**Code -** A code for the service. This field is mandatory.

**Description -** A description to correspond to the service code. This field is mandatory.
**Comment -** The user may provide any comments or remarks. This field is optional.

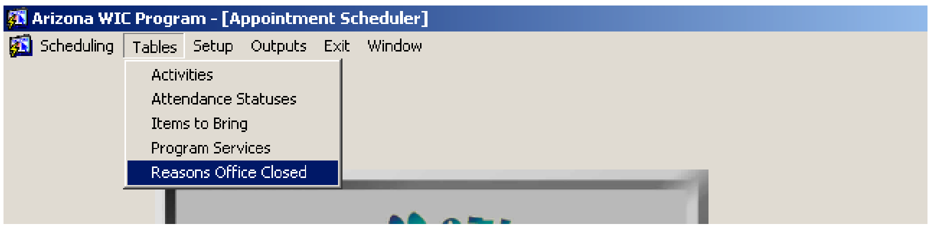
Checkbox (es)

**FI Issued -** The user selects this box if food instruments are issued with this service.
**NE -** This box is to be selected if the service includes a Nutrition Education program.
**Class -** This box is to be selected for services that are only offered to a nutrition education class, and not on an individual basis.
**Disabled** – A default checkmark updatable by CMA development when program services are no longer in use or the checkmark is removed when program services become active again. This field is display only.

### *Maintain Reasons Office Closed*

To Maintain Reasons Office Closed:

1. Click on Tables from the menu bar.
2. Click on Reasons Office Closed as shown below:




The Maintain Reasons Office Closed Window is displayed:

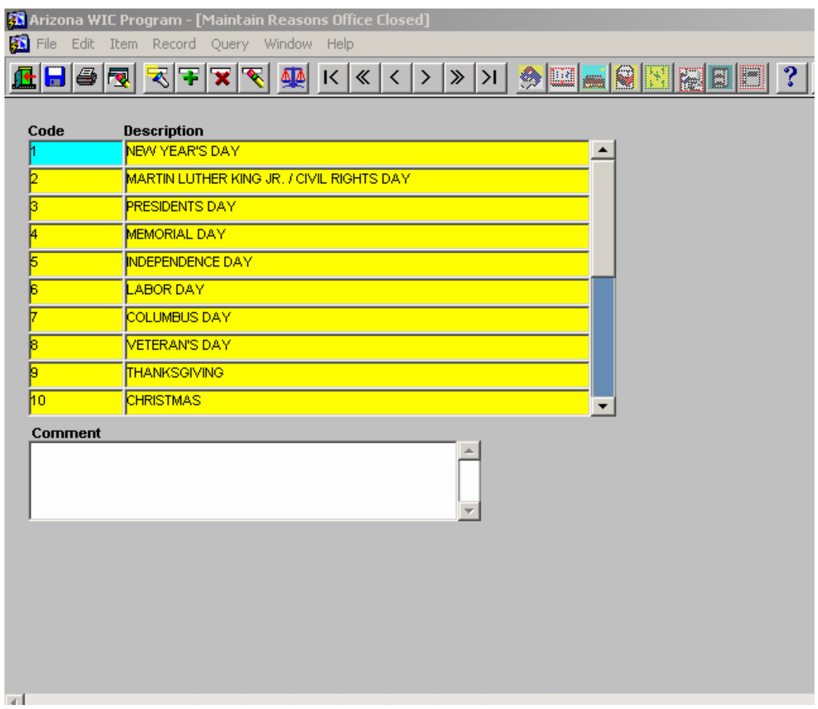



**Figure 30 - Maintain Reasons Office Closed**

Add a Reason Office Closed

1. The system will default the cursor to highlight the code number under the first entry in the Code field. Next to it will be displayed the Description of that Reason the Office is Closed. If there are any comments recorded in the system that relate to this reason, the system will display them under the Comment field.
2. Click the Insert Record icon and the system will create a blank space under the Code and Description fields to add a new Reason.

3. In the Code field, enter a number for the new Reason to be entered. If the number chosen is already in use for another Reason, the system will display a pop-up window indicating: “Reason Office Closed Already Exists.” Click on the OK button, delete the Code number inserted and enter a different number.
4. Press the TAB key so that cursor highlights the corresponding Description blank. Enter the description of the new Reason, then press the TAB key again and enter any correct comment information.
5. Click the Save icon. The system will display a pop-up window indicating: “Transaction Completed.” Click on the OK button and a new Reason for the Office being Closed and a comment to go with it, have successfully been added into the system.

Update a Reason Office Closed

1. Click the Enter Query icon. The system will now automatically clear the Code, Description and Comment fields.
2. The cursor will default to the first blank under the Code fields. Type the Code number of the Reason Office Closed to be updated into this first blank. If the Code number of the Reason to be updated is unknown, press the TAB key once until the cursor moves to the Description field and enter the Reason description, then press the F8 key.
3. The system will populate any code, description, or comment information related to that Item into the corresponding fields.
4. Press the TAB key once and the cursor will move to the Description field. Enter or delete any information to be updated.
5. Press the TAB key once and the cursor will move to the Comment field. Enter or delete any information to be updated (Note: The system will not allow updates to the Code itself. If attempted, the system will indicate: “Field is protected against update”).
6. Click the Save icon. The system will display a pop-up window indicating: “Transaction Completed.” Click on the OK button and Reason Office Closed has successfully been updated (Note: The Code field for the Reasons Office Closed cannot be updated directly. To update the field, first delete the Reason Office Closed, and then add a new Reason Office Closed.)

Delete a Reason Office Closed

1. Click the Enter Query icon. The system will now automatically clear the Code, Description and Comment fields.
2. The cursor will default to the first blank under the Code fields. Type the Code number of the Reason Office Closed to be deleted into this first blank. If the Code Number of the Reason to be deleted is unknown, press the TAB key once until the cursor moves to the Description field and enter the description of the Reason, then press the F8 key.
3. The system will insert any code, description, or comment information related to that Reason Office Closed into the corresponding fields.
4. Verify that the Code, Description, and Comment information being displayed now are the ones to be deleted. After verifying this, click the Remove Record icon.
5. The system will now delete the record from the screen, leaving the fields blank. Click on the Save icon.
6. The system will now display a pop-up window indicating: “Transaction Completed.” Click on the OK button and a Reason Office Closed has successfully been deleted.
7. To verify that the deletion has worked successfully, repeat steps 1-3 above. If the deletion was successful, after pressing the F8 key, the system will display the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

*Figure 30 - Maintain Reasons Office Closed*

*Fields*

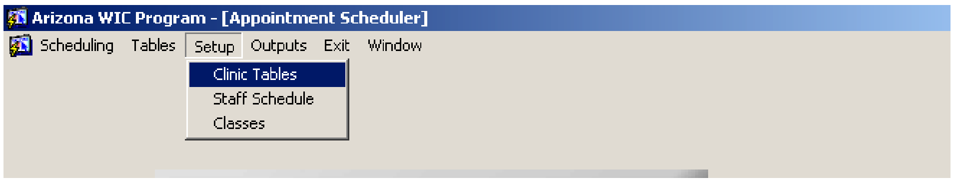
**Code -** The code for the reason the office was closed.  This field is mandatory.
**Description -** The user-entered description of why the office was closed.  This field is mandatory.
**Comment -** The user may provide any comments or remarks.  This field is optional.

# Setup

## *Clinic Tables*

To Maintain Clinic Tables:

1. If the office will be closed at any point during the time period for which the calendar is being created, you must first designate which day(s) the office is to be closed.
2. Click Setup from the menu bar.
3. Click on Clinic Tables as shown below.




To Setup Dates Office Closed:

1. The Dates Office Closed tab displays.
2. Select the Clinic from the list of values button.
3. Click the Query icon.

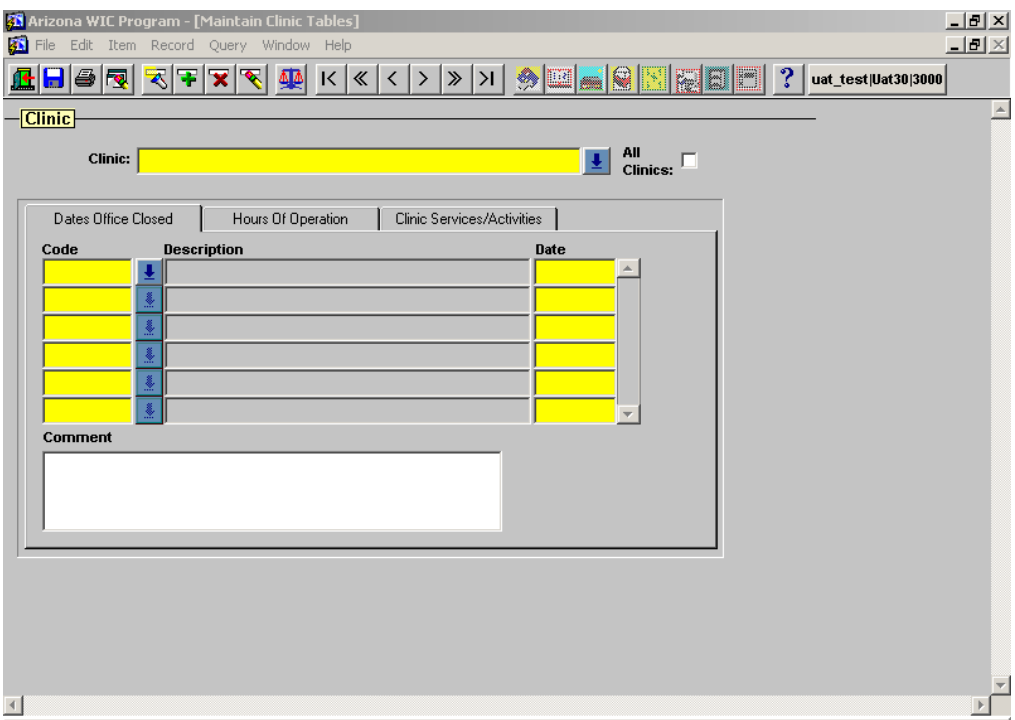



**Figure 31 – Dates Office Closed**

4. TAB to the first row. The cursor will blink under the column heading "Code".
5. Click the list of values button to select the reason to close the clinic.
6. TAB from the code field and the Description displays.
7. TAB to the DATE field.

8. Enter the date that corresponds with the reason the clinic is to be closed. The date format is MM/DD/YYYY.
9. TAB to the Comments field to enter a remarks about the clinic closure date.
10. Enter as many closures as necessary using steps 6-10 for each one.
11. If applying the same clinic closures to all of the other clinics within the agency, click the "All Clinics" checkbox to apply the closures across the agency before saving the added entries.
12. Click the Save icon to complete the transaction.
    NOTE: To use the "All Clinics" function, the user must be logged in as clinic "00".

To Update Dates Office Closed:

1. Click Setup from the menu bar.
2. Click on Clinic Tables as shown below.
3. The Dates Office Closed tab displays.
4. Select the Clinic from the list of values button.
5. Click the Query icon to display any clinic information regarding the dates the clinic is closed.

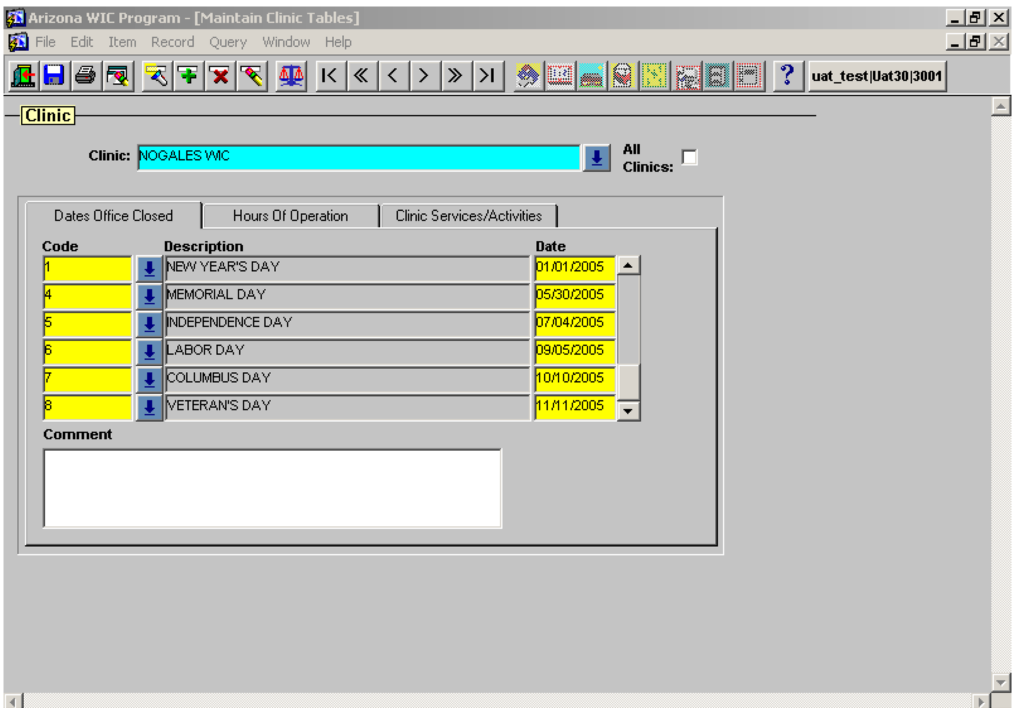



**Figure 32 – Query Dates Office Closed**

6. Click the Insert Record icon to create a blank CODE row for data entry.
7. Click the list of values button to select the reason to close the clinic.
8. TAB from the code field and the Description displays.
9. TAB to the DATE field.
10. Enter the date that corresponds with the reason the clinic is to be closed. The date format is MM/DD/YYYY.
11. TAB to the Comments field to enter a remarks about the clinic closure date.
12. Enter as many closures as necessary using steps 6-10 for each one.
13. Click the Save icon to complete the transaction.

To Delete Dates Office Closed:

1. Click Setup from the menu bar.
2. Click on Clinic Tables as shown below.
3. The Dates Office Closed tab displays.
4. Select the Clinic from the list of values button.
5. Click the Query icon to display any clinic information regarding the dates the clinic is closed.
6. Click on the row that corresponds with date to be deleted.
7. Click the Remove Record icon. This will remove the information for the row.
8. Click the Save icon to complete the transaction.

*Figure 31 – Dates Office Closed*

*Fields*

**Clinic –** Clicking on the list of values button will allow the user to select a clinic. This field is mandatory.
**Code -** The code for the reason the office was closed. This field is mandatory.
**Description -** The user-entered description of why the office was closed. This field is display only.
**Date –** The date the clinic is closed. The format is MM/DD/YYYY. This field is mandatory.
**Comment -** The user may provide any comments or remarks. This field is optional.

*Checkbox(es)*

**All Clinics –** A checkmark in this checkbox will apply the new changes to the entire agency. Each clinic requires the same dates office closed to utilize the function and a system login as clinic 00 is mandatory. This field is optional.

To Establish Hours Of Opertion for a Clinic:

1. Click on the Hours of Operation tab. The clinic information carries over from the Dates Office Closed tab.
2. The cursor displays in entry mode in the first row under “Day”.

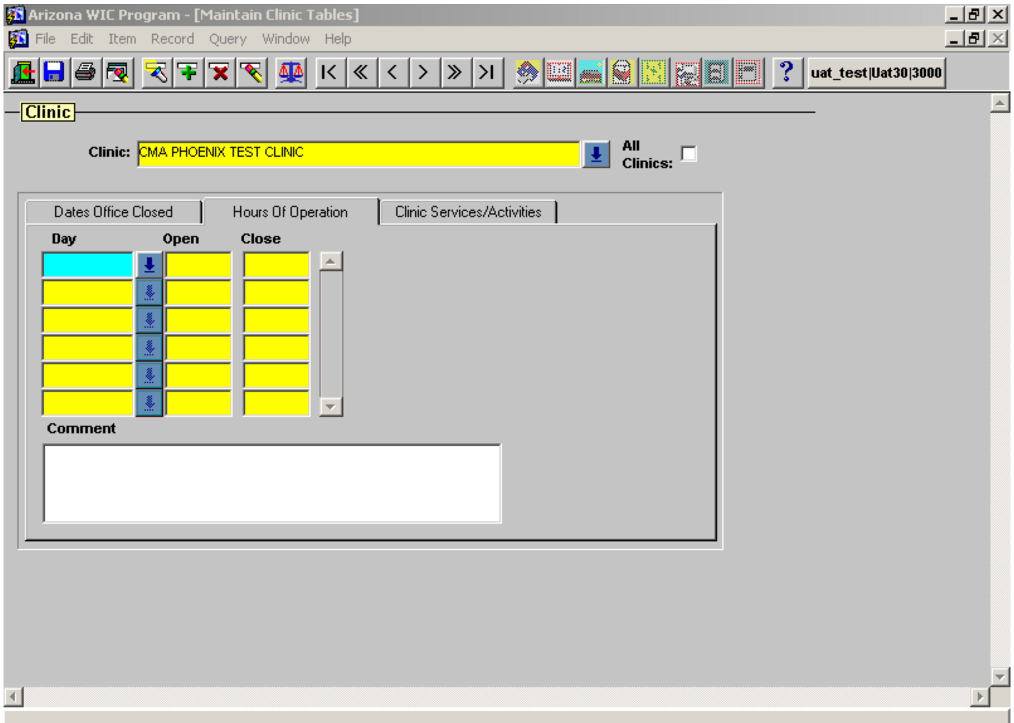



**Figure 33 – Maintain Hours of Operation**

3. Click the list of values arrow in the first blank under the Day field. Select the first day of the week to schedule by clicking on the name of that day.
4. TAB to the Open field, and then enter the time to schedule the clinic to open on that day. The time must be formatted as follows: HH:MM AM or HH:MM PM.
5. TAB to the Close field, and then enter the time to schedule the clinic to close on that day. The time must be formatted as follows: HH:MM AM or HH:MM PM.
6. Press the TAB key once more to move to the Comment field and enter any information that needs to be recorded regarding that day of the week.
7. To schedule the rest of the days of the week for that clinic, click once anywhere in the next row of blanks, then repeat steps 3-6 above for each day of the week.
8. If applying the same clinic hours of operation to all of the other clinics within the agency, click the "All Clinics" checkbox to apply the same hours of operation across the agency before saving the added entries.
9. Upon completion of scheduling each day of the week, click the Save icon and the system will indicate: "Transaction Complete." Click the OK button and the office hours for a clinic have successfully been established.

Update the Established Office Hours for a Clinic:

1. Click on the Hours of Operation tab. The clinic information carries over from the Dates Office Closed tab.
2. The system will automatically populate Day, Open, Close and Comment fields with daily office hours that have been established for the clinic selected.
3. Click on the Open or Close field of the day to update. Or add a new day and hours using the directions to "Setup Hours of Operation". Delete any unnecessary information and enter the new opening or closing time in the following format: HH:MM AM or HH:MM PM.

4. If conflicts exist during the attempt to update the hours of operation, system messaging displays to inform the user the action to take to resolve the conflict to proceed with the change.

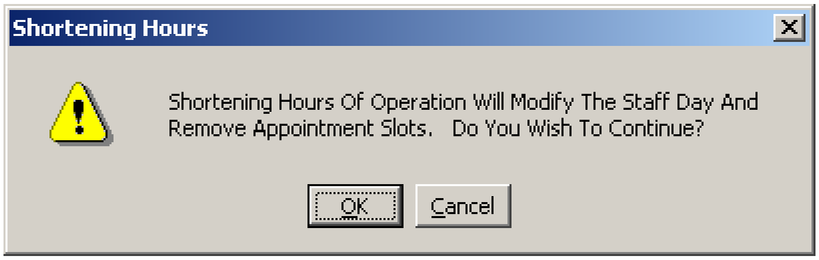



**Figure 34 - Shortening Hours Popup**

5. Once the changes are applied, click the Save icon and the system will indicate: "Transaction Completed." Click the OK button and you have successfully updated the established office hours for a clinic.

*Figure 33 – Maintain Hours of Operation*

*Fields*

**Clinic** - Clicking on the list of values button will allow the user to select a clinic. This field is mandatory.
**Day** - Clicking on the drop down list will allow the user to select a day of the week. This field is mandatory.
**Open** - The hour the clinic opens. The time format is HH:MM AM or HH:MM PM. This field is mandatory.
**Close** - The hour the clinic closes. The time format is HH:MM AM or HH:MM PM. This field is mandatory.
**Comment** - The user may provide any comments or remarks. This field is optional.

*Checkbox(es)*

**All Clinics –** A checkmark in this checkbox will apply the new changes to the entire agency. Each clinic requires the same hours of operation to utilize the function and a system login as clinic 00 is mandatory. This field is optional.

To Setup Clinic Services and Activities:

1. Click on the Clinic Services and Activities tab. The clinic information carries over from the Hours of Operation tab.
2. The cursor displays in entry mode in the first row under "Duration".

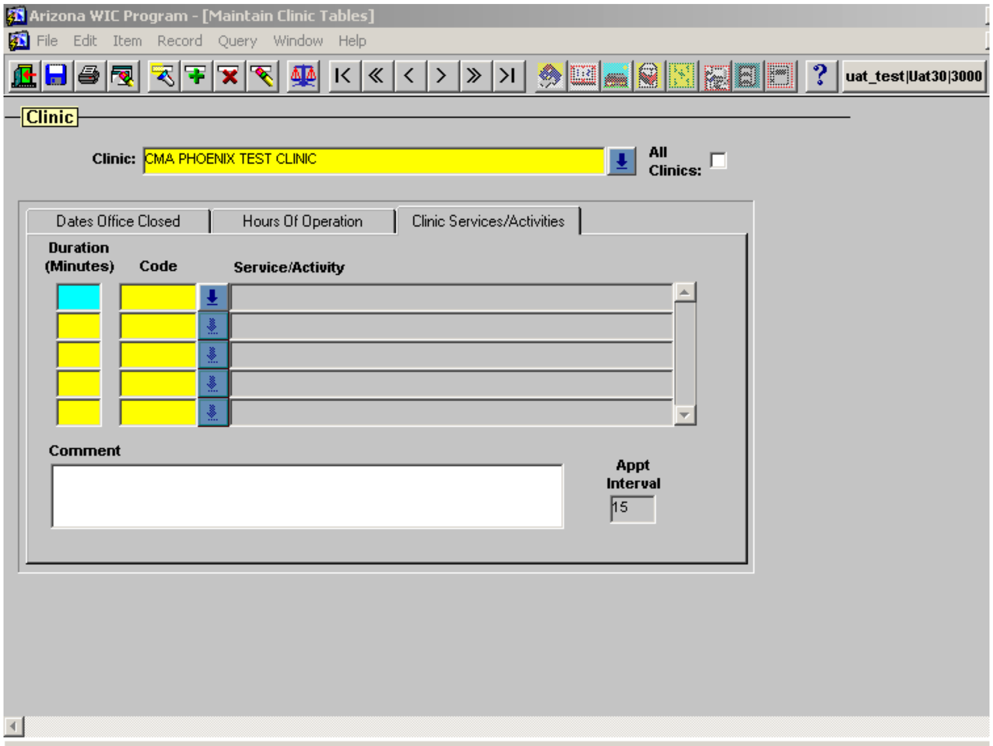



**Figure 35 - Maintain Clinic Services**

3. Enter the Duration in Minutes it will take to complete a Service/Activity that is used in the clinic. The duration has to be in increments of the Appointment Interval. (I.E. appointment slots are 10 minutes apart (appointment interval); an offered service/activity cannot have a duration of 45 minutes, only 40.)
4. TAB to the code field and click on the list of values button to the right of the Code field. Select a Service/Activity your clinic and staff is to perform by double clicking on the name of that service or activity.
5. The system will automatically populate the Code and Service/Activity in the correct fields.
6. Click on the Comment field to record any comments pertinent to the Service/Activity and Time Allotment just entered.
7. Repeat steps 1-4 for each additional Service/Activity the clinic and staff is to perform.
8. If applying the same clinic and staff services/activities to all of the other clinics within the agency, click the “All Clinics” checkbox to apply the same services and activities across the agency before saving the added entries.
9. Click the Save icon. The system will prompt you: “Transaction Completed.” Click the OK button and you have successfully created services and activities for the clinic and staff.

Update Services and Activities:

1. Click on the Clinic Services and Activities tab. The clinic information carries over from the Hours of Operation tab.
2. The cursor displays in entry mode in the first row under “Duration”. The system will automatically populate the fields of Clinic Services/Activities with any information that has been established for the clinic selected.

3. Click on the list of values button to the right of the Code field to update. To update the Service/Activity in a particular line, double click on the name of that new service or activity from the list of values.
4. Or update the Duration of a Service Activity by changing the existing minutes to correspond with the base time of the Appointment Interval.
5. Click once in the comment field, then add or delete any information to be changed by typing it directly into the field.
6. Upon completion of changes, click the Save icon. The system will prompt the user with "Transaction Completed." Click the OK button a clinic day has successfully been updated.

Delete a Service/Activity

1. Click on the Clinic Services and Activities tab. The clinic information carries over from the Hours of Operation tab.
2. The cursor displays in entry mode in the first row under "Duration". The system will automatically populate the fields of Clinic Services/Activities with any information that has been established for the clinic selected.
3. Click on the first space under the Code Field. Click the Remove Record button from the toolbar to delete that service/activity.
4. Repeat step 3 until the Services/Activities have been deleted, then click the Save icon. The system will indicate: "Transaction Completed." Click the OK button.
5. If the Service/Activity is tied to Staff Day records, the Service/Activity cannot be deleted. Re-query to undo the changes and return to the screen to original state.

*Figure 35 - Maintain Clinic* Services

*Fields*

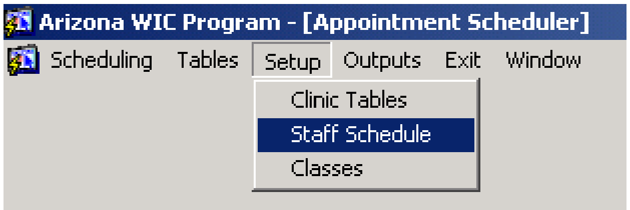
**Clinic -** Clicking on the list of values button allows the user to select a clinic. This field is mandatory.
**Duration (Minutes) –** Enter the duration of time required to perform the Service/Activity. The duration must be a multiple of the Appointment Interval as established in Operations Management module. This field is mandatory.
**Code -** Clicking on the list of values button allows the user to select the codes that correspond to the Services/Activities. This field is mandatory.
**Service/Activity -** Defaults when the code is selected. This field is display only.
**Comment -** The user may provide additional comments or remarks. This field is optional.
**Appt. Interval** – The duration of each appointment slot for the clinic appointment sheet. This number is determined in the Organizational Units screen of the Operations Management module. This field is display only.

### *Staff Schedule*

To Maintain Staff Schedule:

To Setup the Staff Order:

1. Click Setup from the menu bar of the Appointment Scheduler Splash Screen.
2. Click on Staff Schedule as shown below.




3. The Staff Order tab is displayed.

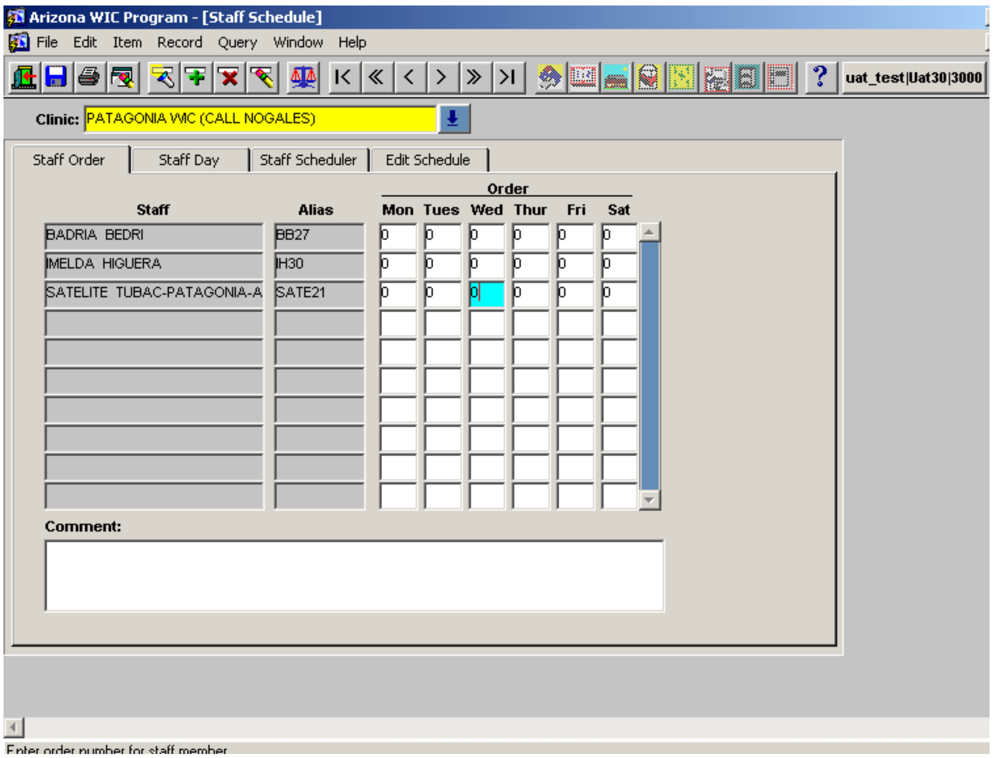



**Figure 36 – Maintain Staff Order 1**

4. Click the Clinic field list of values button and select the clinic by double clicking on the name of that clinic.
5. The Staff names and Aliases will automatically display based on the staff members information entered in the Staff Data screen of the Operations Management module.
6. Establish the “Order” that staff will appear on the Staff Day screen and Appointment Sheet each day the clinic is open.
7. The system defaults every day for each staff with zeros.
8. Click on the first business day and enter a number for the first staff, as they should appear on the Staff Day and Appointment Sheet screens.

NOTE: If the clinic does not have defined hours of operation, a staff order cannot be generated.
NOTE: Do not duplicate staff order numbers for two or more staff.

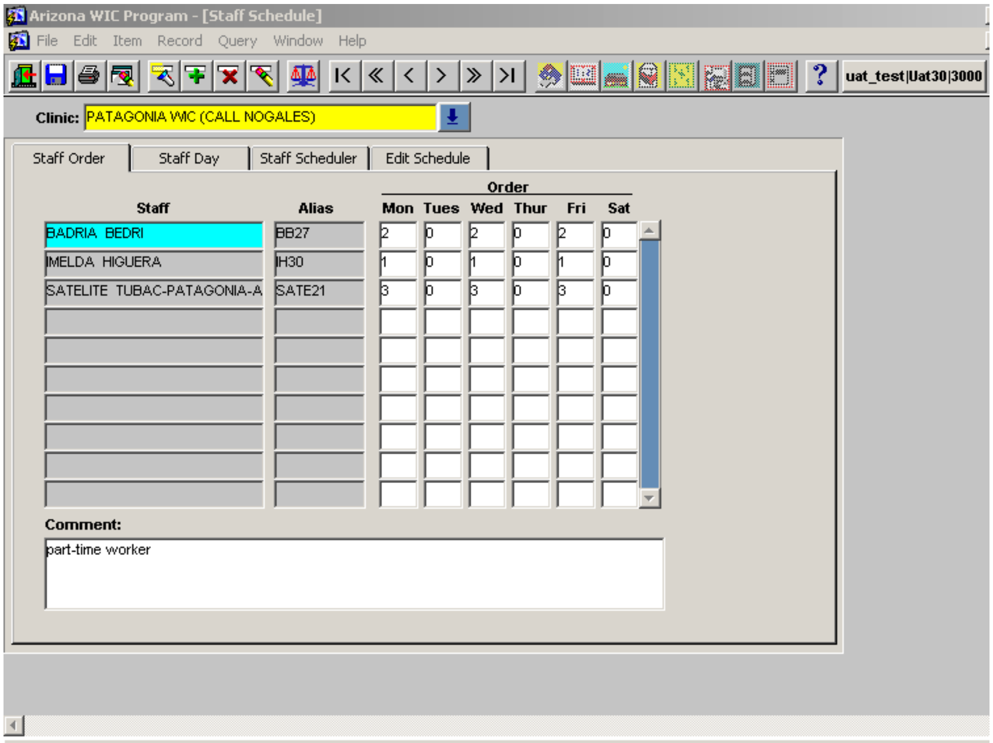



**Figure 37 – Maintain Staff Order 2**

9. TAB to the next workday for the staff member and enter the number where they should appear on the Staff Day and Appointment Sheet screens.
10. TAB to the Comments field and enter any necessary remarks for the staff member.
11. The staff that do not work every day of the week need to have the days not worked filled with zeros.
12. Continue adding staff order to the remaining staff according to steps 8 and 9.
13. Click the Save icon. The system will prompt you: "Transaction Completed." Click the OK button and you have successfully created staff order.

To Update Staff Order:

1. Click Setup from the menu bar of the Appointment Scheduler Splash Screen.
2. Click on Staff Schedule.
3. The Staff Order tab is displayed.
4. Click the Clinic field list of values button and select the clinic by double clicking on the name of that clinic.
5. The Staff names and Aliases will automatically display based on the staff members information entered in the Staff Data screen of the Operations Management module.
6. TAB to the staff order of the staff whose order needs to be updated. Change the appropriate number for the appropriate day of the week. No two staff can have the same staff order number. The change is reflected in real time on the appointment sheet and staff day screens.

7. Click the Save icon. The system will prompt you: "Transaction Completed." Click the OK button and you have successfully created staff order.

To Delete Staff Order:

1. The Staff Data screen, in the Operations Management module section describes how to delete staff from the clinic and agency. Please refer to that section for instructions.
2. Once the staff member is appropriately removed from the clinic, no longer will the Staff Order screen display the staff information.

*Figure 36 – Maintain Staff Order* 1

*Fields*

**Clinic** – Clicking on the list of values button allows the user to select a clinic. This field is mandatory.
**Staff-** The last name and first name of the staff working in the designated clinic as entered in the Staff Data screen. This field is display only.
**Alias-** The unique naming identifier for the staff's staff day and appointment sheet columns. This alias is created in the Staff Data screen. This field is display only.
**Order-** The placement of each staff schedule on the appointment sheet for each day of the week. This field is required to publish staff to a calendar, but is also optional if choosing not to publish staff to the calendar.
**Comment-** The user may provide additional comments or remarks. This field is optional.

To Setup Staff Day:

1. Click on the Staff Day tab. The clinic information carries over from the Staff Order tab.
2. The cursor displays in the first row under "Day of Week" with the default for Monday. The staff scheduled for the clinic on Monday display in the flex grid.
3. The system defaults the clinic work hours to NA (not available).

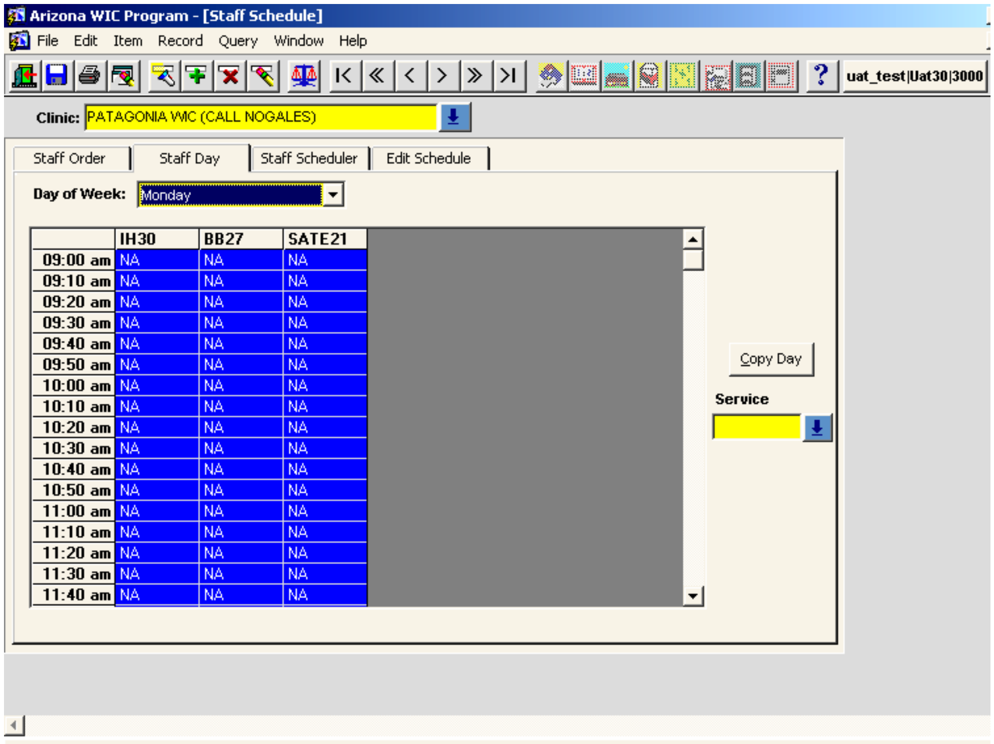



**Figure 38 – Maintain Staff Day 1**

4. Either use the default day of week to begin, or select the first day of the week the clinic is open to assign hours and services to the staff displayed using the list of values arrow.
5. TAB off the day of week field and the cursor moves to the Services field.
6. Click the list of values arrow to view the list of services and activities, and double click on the name of that service or activity from the list of values.
7. The Service field will display the selection.
8. Staff whose work schedules start and end after the clinic has opened and closed should have the service NA assigned to the slots they are not available to work.
9. Click the first cell of the first staff to assign the Service/Activity. If the staff provides the service for a time period longer than the selected time increment, then with the cursor still in that first cell, click and drag the mouse down the column of cells needed to fill for the service or activity.
   NOTE: More than one staff providing the same service or activity can have the same service applied to their columns by clicking and dragging the mouse over the number of staff necessary to have the service or activity.
10. Click in the Service field and select a different service/activity to apply to the staff column. Continue to repeat steps 6-10 until the staff's work hours have been populated with the services they provide or the activities they are involved in.

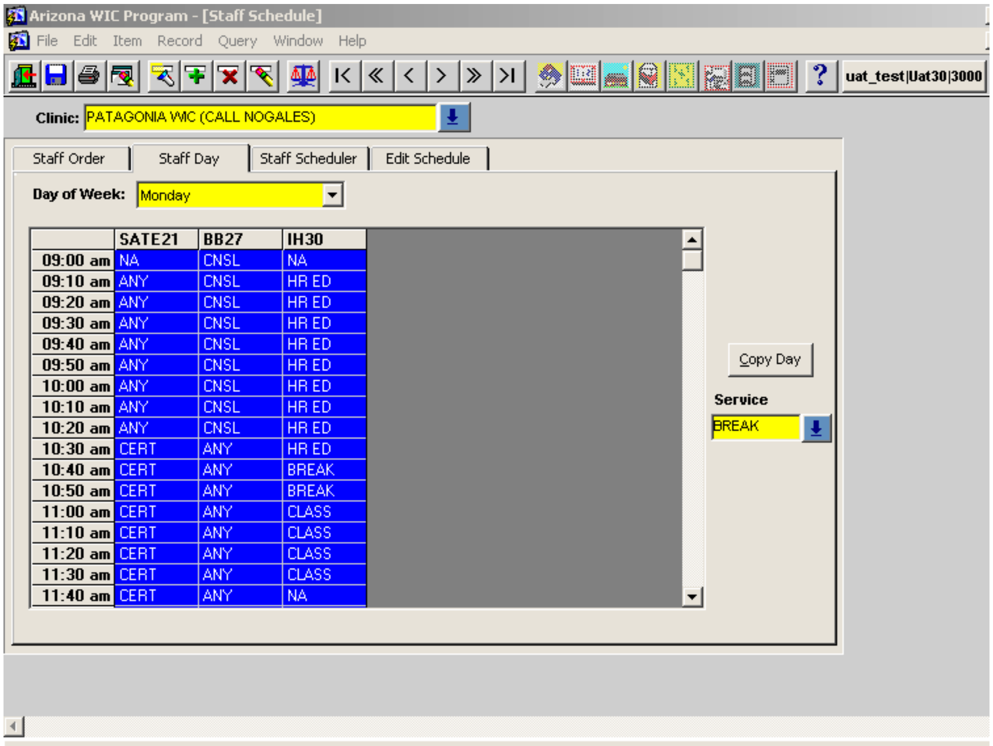



**Figure 39 - Maintain Staff Day 2**

11. Assign services for all staff that are to appear on the appointment sheet for the first staff day.
12. Click the Save icon. The system will prompt you: “Transaction Completed.” Click the OK button and you have successfully created the first staff day.
13. If the first completed staff day applies to every other staff day within the week, then the completed day can be copied to the remaining days.
14. Click the Copy Day pushbutton.

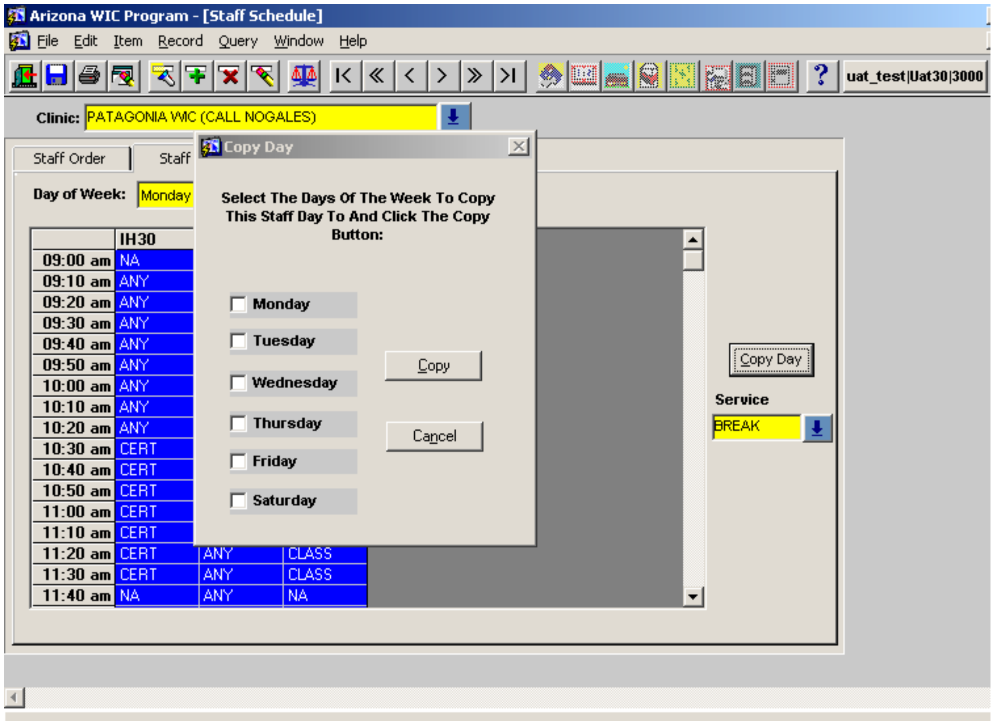



**Figure 40 - Copy Day Popup**

15. Select the days of the week to copy this staff day to, by clicking on the check box next to each day of the week you wish to schedule. More than one can be selected.
16. Click the Copy button. The schedule will copy to identical days. If a day is not identical to the staff day on the screen, the copy will not occur. They system displays messaging when the days do not copy.
17. Once the copy is complete, a message "Schedule has been copied successfully" displays.
18. Click OK to the message.
19. Click the Save icon. The system will prompt you: "Transaction Completed."

To Update a Staff Day:

1. Click on the Staff Day tab. The clinic information carries over from the Staff Order tab.
2. The cursor displays in the first row under "Day of Week" with the default for Monday. The staff scheduled for the clinic and their services/activities display for Monday in the flex grid.
3. Click the list of values arrow to view the list of services and activities, and double click on the name of that service or activity from the list of values.
4. The Service field will display the selection.
5. Click the first cell of the staff to re-assign the Service/Activity. If the staff provides the service for a time period longer than the selected time increment, then with the cursor still in that first cell, click and drag the mouse down the column of cells needed to fill for the service or activity.
6. Continue to repeat steps 3-5 until the staff's work hours have been populated with the services they provide or the activities they are involved in.
7. Click the Save icon. The system will prompt you: "Transaction Completed."
8. Once the changes have been made for an existing published calendar it is required to update the staff's calendar in Staff Schedule. Please reference the Staff Schedule section, To Update a Staff Schedule.

To Delete a Staff Day:

1. The Staff Data screen, in the Operations Management module section describes how to delete staff from the clinic and agency. Please refer to that section for instructions.
2. Once the staff member is appropriately removed from the clinic, no longer will the Staff Day screen display the staff information.

*Figure 38 – Maintain Staff Day 1*

*Fields*

**Clinic-** Clicking on the list of values button allows the user to select a clinic. This field is mandatory.
**Day of Week-** A list of the days of the week the clinic is open, Monday through Saturday. Staff services are applied to each day the clinic is open and the staff are available. This field is required.
**Service-** A list of services and activities the clinic provides and is established in Clinic Tables – Services/Activities. This field is required.
**Cell related to Time/Staff/Service-** The clinic hours of operation, the staff assigned to the clinic, the staff's working hours, and the services/activities the staff perform during their workday. This field is required.

*Push button(s)*

**Copy Day-** The function of copying one staff day to another or multiple staff days.

To Setup the Staff Schedule:

1. Click on the Staff Scheduler tab to publish the staff calendar for the clinic. The clinic information carries over from the Staff Day tab.
2. The cursor displays in the Year field and defaults to the current year. The Month field defaults to the current month.

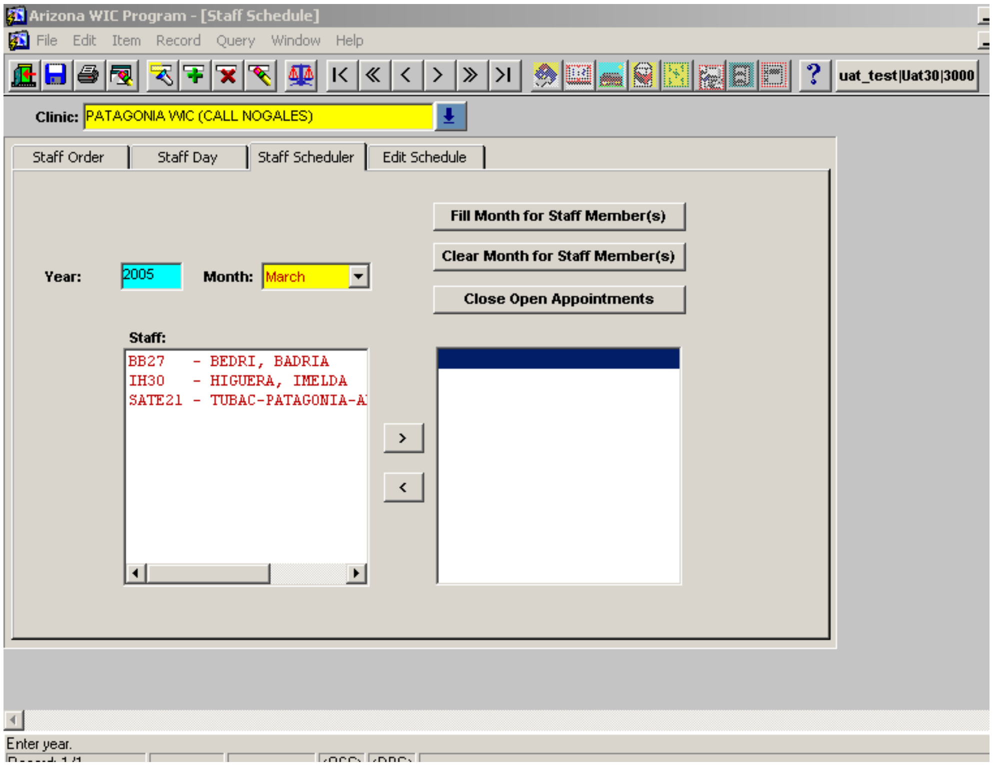



**Figure 41 - Maintain Staff Scheduler**

3. Make sure that the year and month displayed are correct. If not, use the month list of values arrow to select the appropriate month.
4. The Staff field displays the staffs that have a staff order and staff day established.
5. Click to highlight the staff names and aliases in the Staff column. Click the forward arrow (>) to transfer a copy of the staff name into the second column for calendar publishing. If a staff member was selected in error, click to highlight the name of the staff in the second column and click the backward arrow (<) to remove the staff name.

   OR

6. Click to highlight the staff names and aliases in the Staff column, and double click on the name to transfer a copy of the staff name into the second column for calendar publishing. If a staff member was selected in error, click to highlight the name of the staff in the second column and double click to remove the staff name.
7. Continue this process of adding staff to the second column for calendar publishing until all appropriate staff has been included.
8. Click the "Fill Month For Staff Member(s)" push button to activate the creation of appointment slots according to the Staff Order and Staff Day information pertaining to each staff.
9. Once the process is complete, a message displays with the amount of appointment slots created.

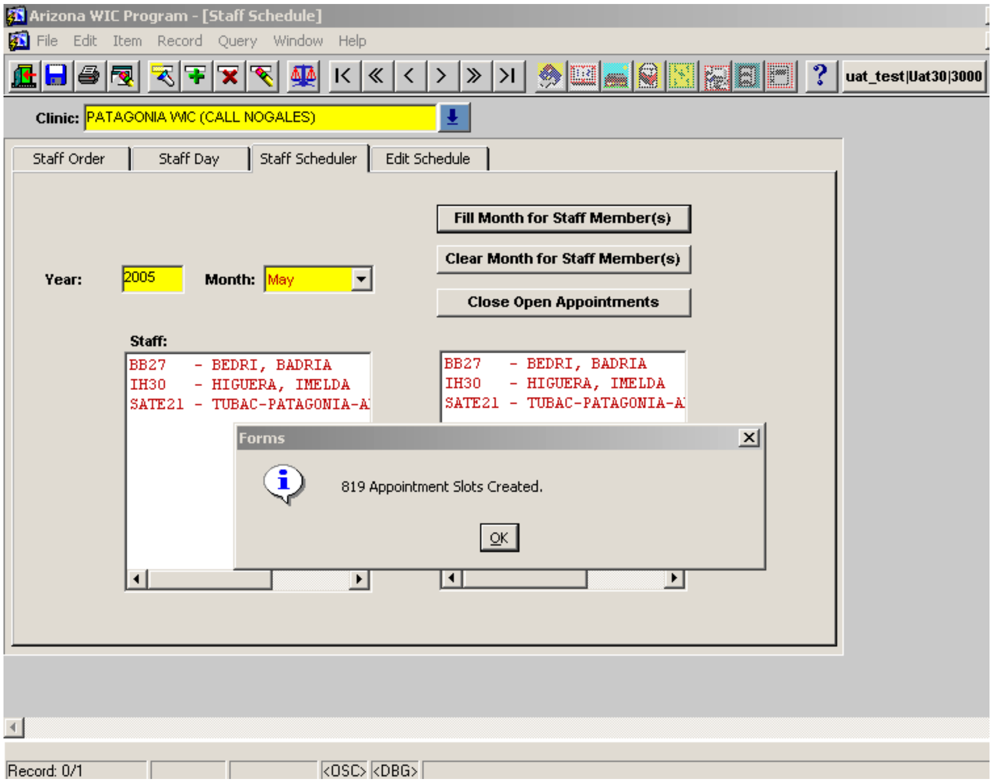



**Figure 42 - Appointment Slots Created popup**

10. Click OK to the message.
11. Continue to publish calendars for consecutive months, if applicable.
12. Click the Exit icon to return to the Appointment Scheduler Splash Screen.
13. Click on Scheduling from the menu bar.
14. Click on the drop down Appointments.
15. Click on the Appointment Sheet tab, and select the clinic from the clinic field list of values arrow.
16. Click on a calendar date recently published to populate the flex grid. View the newly added calendar information created from the Staff Schedule screen.

To Modify the Staff Scheduler:

1. Changes made to a published calendar for one or many staff require that the calendar be cleared and modified.
2. Click on Setup from the menu bar and Staff Schedule from the drop down menu.
3. Click the list of values button next to the Clinic field in the Staff Order screen to retrieve the data.
4. Click the Staff Scheduler tab.
5. Select the appropriate month and year.
6. Select the appropriate staff with changes to their schedules in Staff Day, or those who need to be deleted off the schedule, and copy their names to the second column as described in the previous section.
7. Click the “Clear Month For Staff Member(s)” push button. This action will clear all open and available appointment slots. A message displays stating the appointment slots have been cleared.
8. If appointments exist on the appointment sheet while attempting to clear the month, a message displays that appointments need to be removed from the staff schedule in order to complete the “clear month” for the selected calendar month.

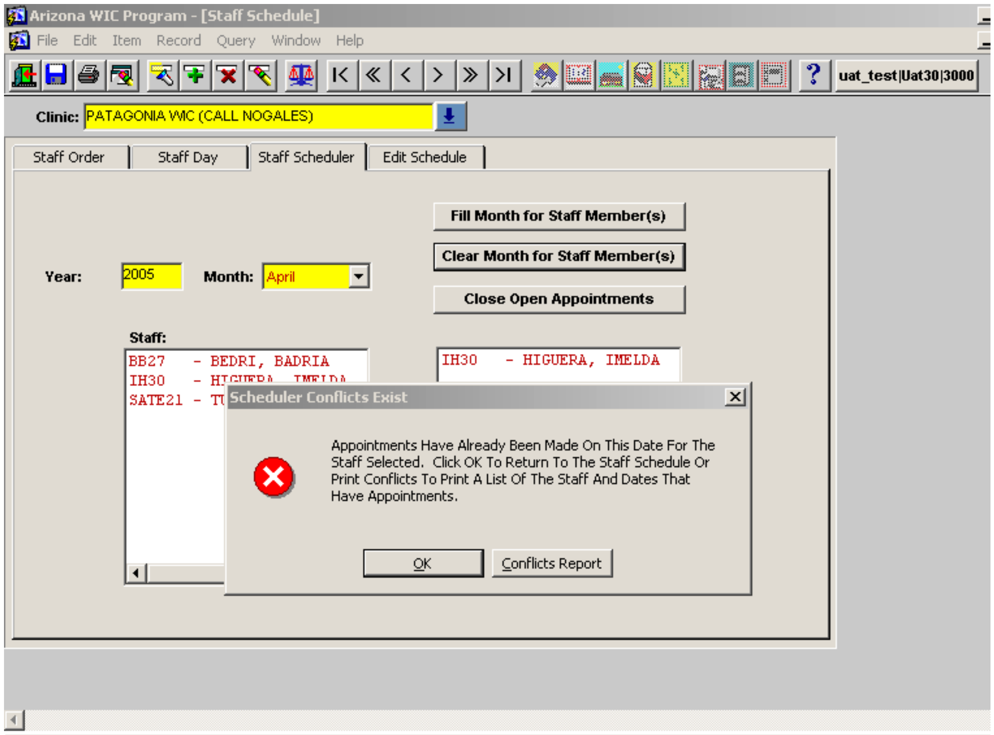



**Figure 43 - Conflicts Report Popup**

9. Click the Conflicts Report to display the name of the families that need to be removed from the staff's schedule on the appointment sheet. Or click OK to remove the popup and then resolve the conflict.
10. Once the conflicting appointments have been removed from the appointment sheet, the "clear month for staff member(s)" can be completed. A message displays with the number of appointment slots cleared.
11. If the result is to re-publish the calendar month, complete steps 5-11 in the previous section, To Setup the Staff Schedule. If the result is to un-publish a staff schedule, then clearing the month(s) completes the process.
12. The "Close Open Appointments" function is essential when a current calendar is receiving appointments steadily and becomes difficult to clear the month when new appointments arise as conflicts to clearing the month. The "Close Open Appointments" push button can be used prior to using the "Clear Month for Staff Member(s)" function.
13. Clicking the "Close Open Appointments" will create an N/A, not available code on the selected staff's schedule, thus preventing anyone from scheduling appointments to that staff. Then the "Clear Month for Staff Member(s)" function may be used to delete the staff schedule from the appointment sheet.
14. Click the Exit icon to return to the Appointment Scheduler Splash Screen.

*Figure 42 - Appointment Slots Created popup*

*Fields*

**Year**- The system defaults the current year to this field. This field is modifiable and mandatory.
**Month**-The system defaults the current month to this field. This field is modifiable and mandatory.

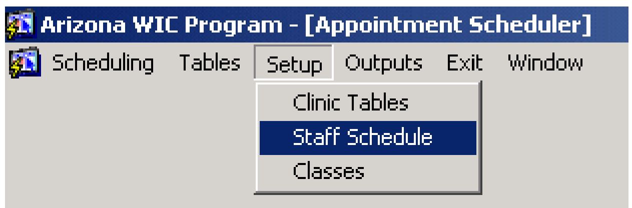
**Staff-** The last name and first name of the staff working in the designated clinic as entered in the Staff Data screen. These are the staff having a staff order and staff day created and are scheduled to be published to the calendar.  This field is required.

*Push button(s)*

**Fill Month for Staff Member(s)-** This button is used to publish staff calendars.
**Clear Month for Staff Member(s)-**This button is used to delete staff calendars.
**Close Open Appointments-**This button is used to prevent additional appointments from being scheduled by marking all available/open appointments with “not available”. This is used in conjunction with the Clear Month for Staff Member(s) functionality.

To Edit the Schedule for Staff Member(s):

1. Click on Appointment Scheduler from the Master Menu.
2. Click on Setup from the menu bar.
3. Click on Staff Schedule as shown below.




4. The first tab is Staff Order.  Click the list of values button to the right of the Clinic field. Select the clinic desired by double clicking on the name of the clinic.
5. Click on the Edit Schedule tab.
6. Using the calendar, click on the appropriate year, month, and day that will requires an edit to the staff member(s) schedule(s).  That date will display at the bottom of the calendar.
7. Click the list of values button to the right of the ‘Staff’ field.  Select either the staff member’s name or the “All Staff” option.
8. Click on the Query icon. The window will populate with the staff member(s) schedule for the current date.

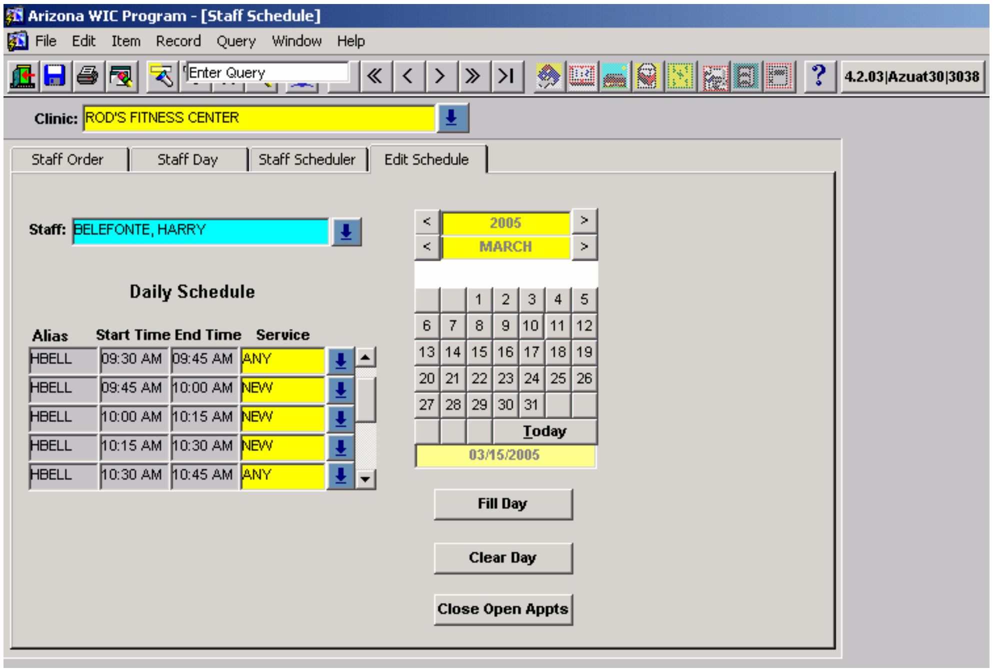



**Figure 44 – Edit Schedule Pop-Up**

9. Each open appointment slot is now available for editing.
10. Click the list of values button for the Service field according to the time of the appointment slot to be modified.
11. Modify the service. Continue this process for as many slots need modifying.
12. To change the day – click on the desired day in the calendar. Then click on the query icon to execute the query.
13. Select the appointment slot(s) for which changes are to be made.
14. Click the drop down menu to the right of the Service box where the list of available services will present.

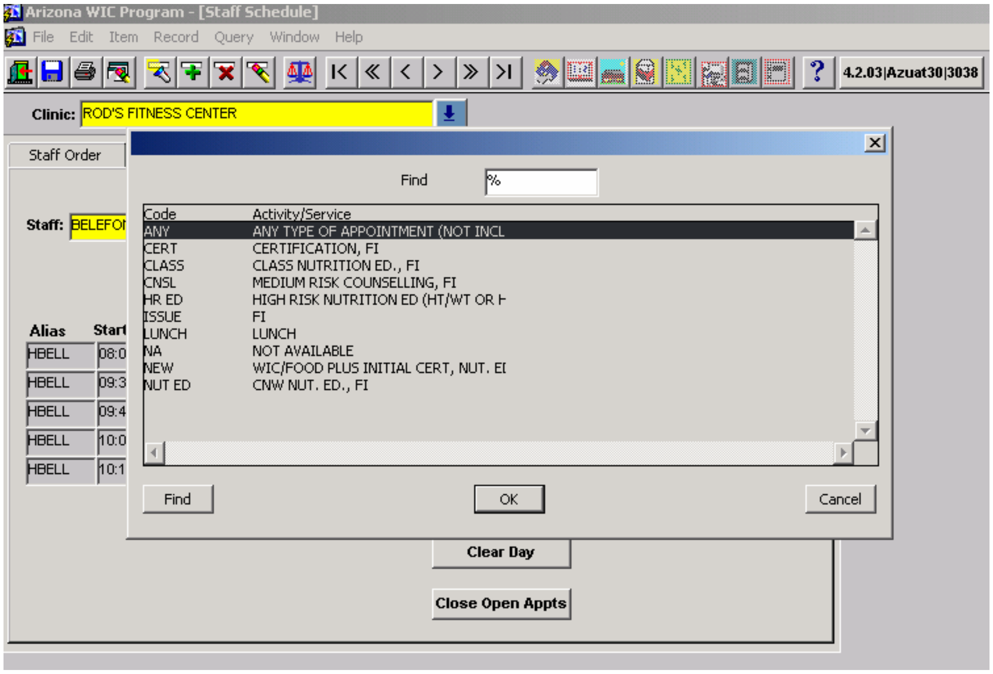


**Figure 45 – Available Service Dialog Box**

15. Select a service and click the OK button.
16. Click the Save icon. The system will display a pop-up window indicating: "Transaction Completed."

Create Staff Appointment Slots for a Day Not Previously Scheduled:

1. Click on Appointment Scheduler from the Master Menu.
2. Click on Setup from the menu bar.
3. Click on Staff Schedule.
4. Click the list of values button to the right of the Clinic field. Select the clinic desired by double clicking on the name of the clinic.
5. Click on the 'Edit Schedule' tab.
6. Select the date from the calendar for which appointments are to be created.
7. Click the list of values button to the right of the 'Staff' field. Select either the staff member's name or the All Staff option.
8. Click on the Query icon.
9. The window will return with no records queried.
10. Click the Fill Day button. A message displays that appointments slots were created for the specific date.
11. Click OK to the message.
12. Continue with steps 6-11 until the designated days have been published and appointment slots created.
13. Click the Save icon. The system will display a pop-up window indicating: "Transaction Completed."

Clearing Appointments for a Day:

1. Click on Appointment Scheduler from the Master Menu.

2. Click on Setup from the menu bar.
3. Click on Staff Schedule.
4. Click the list of values button to the right of the Clinic field. Select the clinic desired by double clicking on the name of the clinic.
5. Click on the 'Edit Schedule' tab.
6. Select the date from the calendar for which appointments are to be cleared.
7. Click the list of values button to the right of the 'Staff' field. Select either the staff member's name or the All Staff option.
8. Click on the Query icon. The window will populate with the staff member(s) schedule for the current day.
9. The cursor displays in the Service field for the first row. Click the Clear Day button.
10. A message displays that the appointment scheduled for the specific date has been cleared.
11. Click OK to the message.
12. The Daily Schedule grid removes the staff and appointment schedule information.
13. Continue with steps 6-11 until the designated days have been cleared.
14. If existing appointments are scheduled for the day appointments need to be closed, a conflicts report displays with the appointments to be resolved prior to closing the day.
15. Click the Save icon. The system will display a pop-up window indicating: "Transaction Completed."

Closing Open Appointments for a Day:

1. Click on Appointment Scheduler from the Master Menu.
2. Click on Setup from the menu bar.
3. Click on Staff Schedule.
4. Click the list of values button to the right of the Clinic field. Select the clinic desired by double clicking on the name of the clinic.
5. Click on the 'Edit Schedule' tab.
6. Select the date from the calendar for which appointments are to be closed.
7. Click the list of values button to the right of the 'Staff' field. Select either the staff member's name or the All Staff option.
8. Click on the Query icon. The window will populate with the staff member(s) schedule for the current day.
9. The cursor displays in the Service field for the first row. Click the Close Open Appts. button.
10. A message displays that the appointment scheduled for the specific date has been closed.
11. Click OK to the message.
12. The Daily Schedule grid removes the staff and appointment schedule information.
13. If existing appointments are scheduled for the day appointments need to be closed, a conflicts report displays with the appointments to be resolved prior to closing the day.
14. Continue with steps 6-11 until the designated days have been cleared.
15. Click the Save icon. The system will display a pop-up window indicating: "Transaction Completed."

*Figure 44 – Edit Schedule Pop-Up*

*Fields*

**Clinic -** Clicking on this list of values button allows the user to select a clinic. This field is mandatory.

**Staff -** Clicking on this list of values button allows the user to select a staff member. This field is mandatory.
**Alias –** The assigned alias for selected staff member. This field is display only.
**Start Time –** The start time for each appointment slot. This field is display only.
**End Time –** The end time for each appointment slot. This field is display only.
**Service –** This service the selected staff member is scheduled to perform in each appointment slot. This field is modifiable and required.

*Push Button(s)*

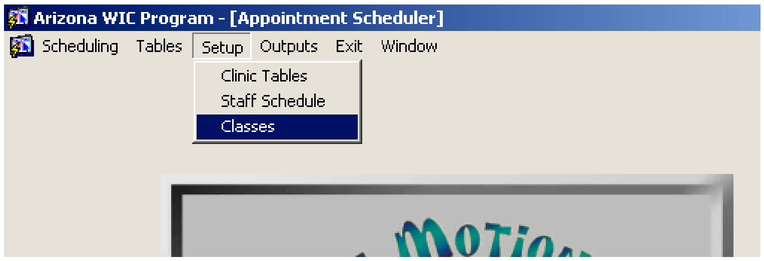
**Calendar Buttons -** Press the date on the calendar for which the user would like to view appointment schedules from.
**Today -** Press the Today button to select today as the date on which appointments will be edited.
**> -** Indicates advancing to the next month(s) and year(s).
**< -** Indicates navigating to the previous month(s) and year(s).
**Fill Day -** Creates open appointment slots for select staff member on selected day.
**Clear Day** – Clears all open appointment slots for select staff member on selected day.
**Close Open Appts** – Closes all open appointment slots for select staff member on selected day. The scheduler displays N/A, not available in the appointment slots.

*Figure 45 – Available Service Dialog Box*
**OK** – Accepts selected service and brings user back to the Staff Schedule tab.
**Cancel -** Cancels the document selections.

## *Classes*

To Setup and Maintain Classes:

1. Click Setup from the menu bar of the Appointment Scheduler Splash Screen.
2. Click on Classes as shown below.




3. The Class Categories tab displays.

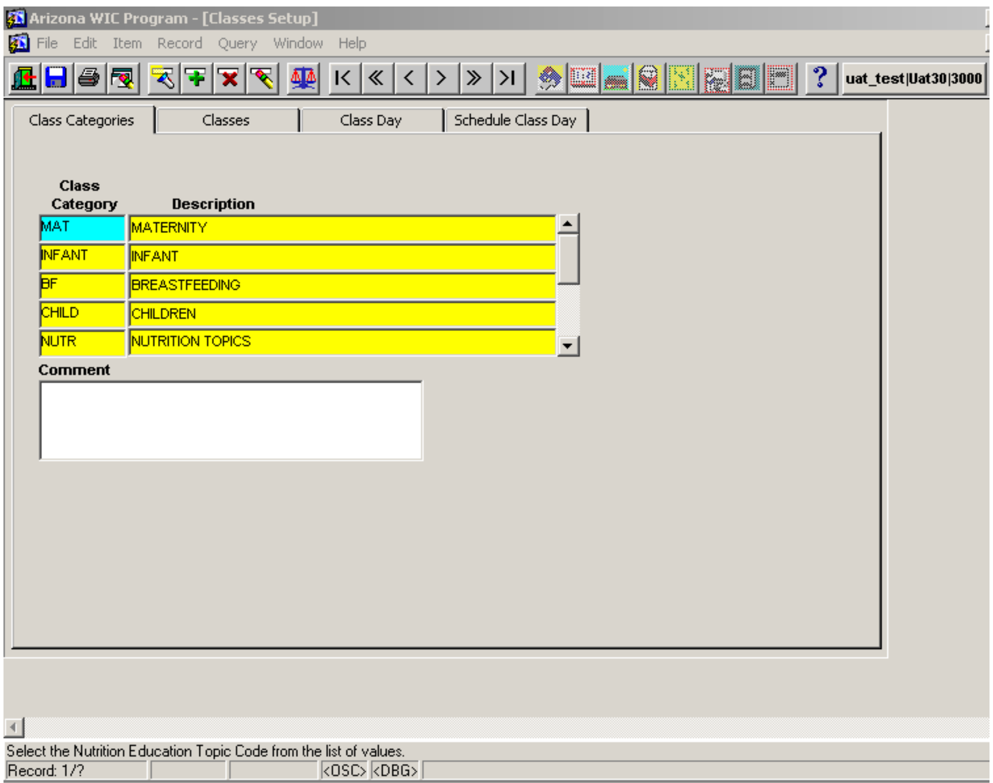



**Figure 46 - Maintain Class Categories**

4. Upon entering the screen, click the Query icon to retrieve the State maintained class category information.
5. A message displays with “inserts and updates are not permitted at the local agency level. Click OK to clear the message.
6. Click the Classes tab.

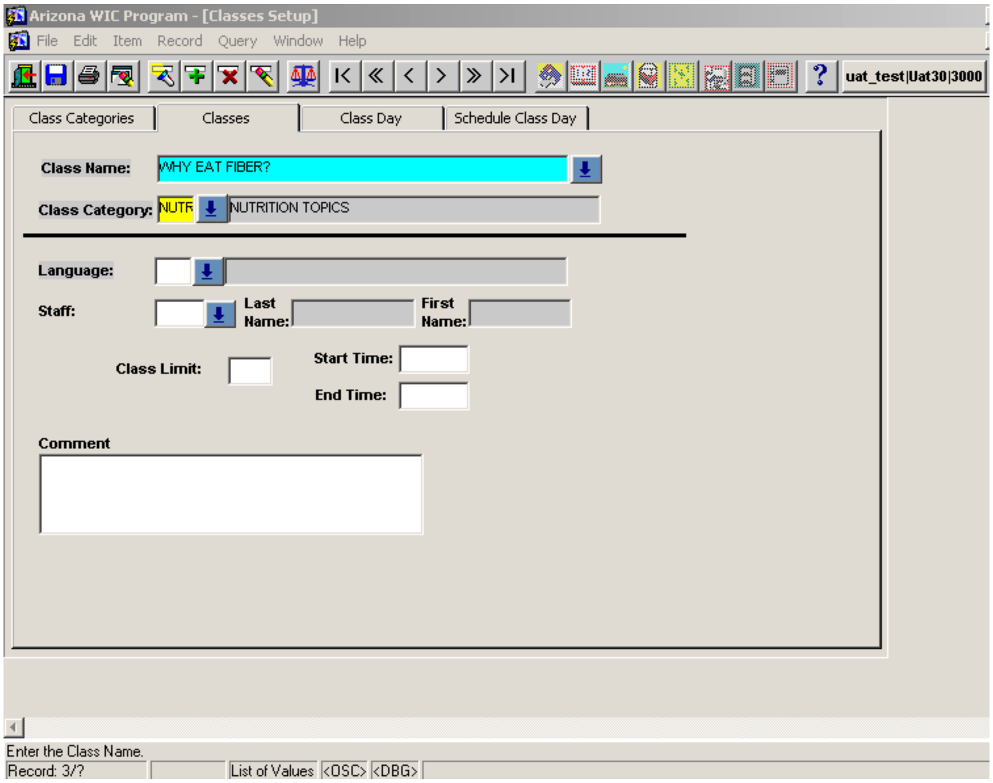



**Figure 47 - Maintain Classes**

16. Upon entering the screen, click the Query icon to retrieve potential classes for the Local Agency.
17. If no classes exist for the agency, create classes for the Local Agency. If classes do exist, but classes must be added then add classes.
18. Start with a blank screen. Either the screen will be in Entry mode and blank for creating classes the first time, or use the Insert Record icon to create a blank record to add classes.
19. Click in the Class Name field; type the name of the class to be offered throughout the Local Agency.
    NOTE: The list of values screen displays previously entered class names and information.
20. TAB to the Class Category field. Click the list of values button and select the class category for the class by double clicking on the selection.
21. The Language, Staff, Class Limit, Class Start and End time, and Comment fields are optional and not required when creating classes for the Local Agency.
22. Click the Save icon. The system will display a pop-up window indicating: “Transaction Completed.”
23. Click the Class Day tab.

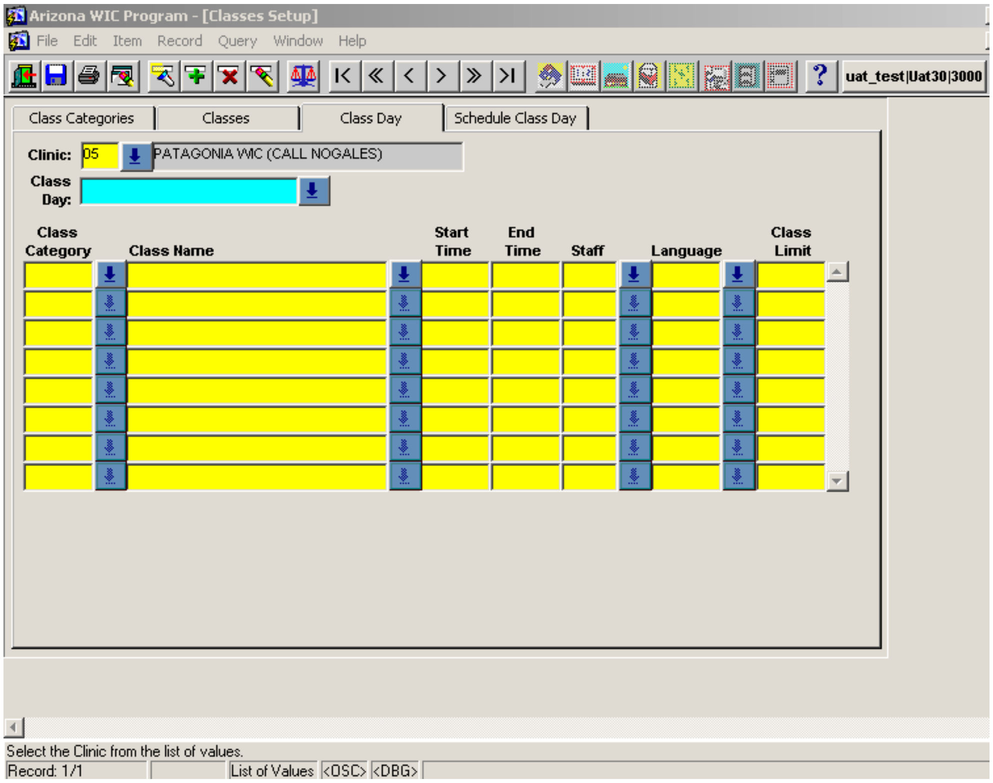



**Figure 48 - Maintain Class Day**

24. Click the Clinic list of values button and double click on the clinic selection.
25. TAB to the Class Day field. Either select a class day from the list of values button to use and/or modify, or begin a new class day by typing in the name of the class day.
26. TAB to the Class Category field. Click the list of values button to view the category selection and double click the selection to populate the field.
27. TAB to the Class Name field. Click the list of values button to view the list of classes that were created under that category. Double click on the class selection.
28. TAB to the Start Time field and enter the time the class begins in the format of HH:MM AM or PM.
29. TAB to the End Time field and enter the time the class ends in the format of HH:MM AM or PM.
30. TAB to the Staff field and click the list of values button, double click the staff selection that teaches classes. If unsure which staff teaches classes, revisit the Staff Day screen in Staff Schedule.
31. TAB to the Language field and click the list of values button, double click the language selection for which the class is offered.
32. TAB to the Class Limit field and enter the maximum number of families the class can hold.
33. Enter as many classes desired to make up a class day. Repeat steps 18-24.
34. Click the Save icon. The system will display a pop-up window indicating: "Transaction Completed."
35. Click the Schedule Class Day tab.
36. The Clinic and Class Day information carry over from the Class Day screen.
37. There are two different ways to publish the classes to the calendar.
38. The first is using a daily schedule function with the calendar.
39. Select the year, month, and day(s) the class day is offered by clicking on the calendar date(s). The single click copies the date to the Date(s) Selected field.

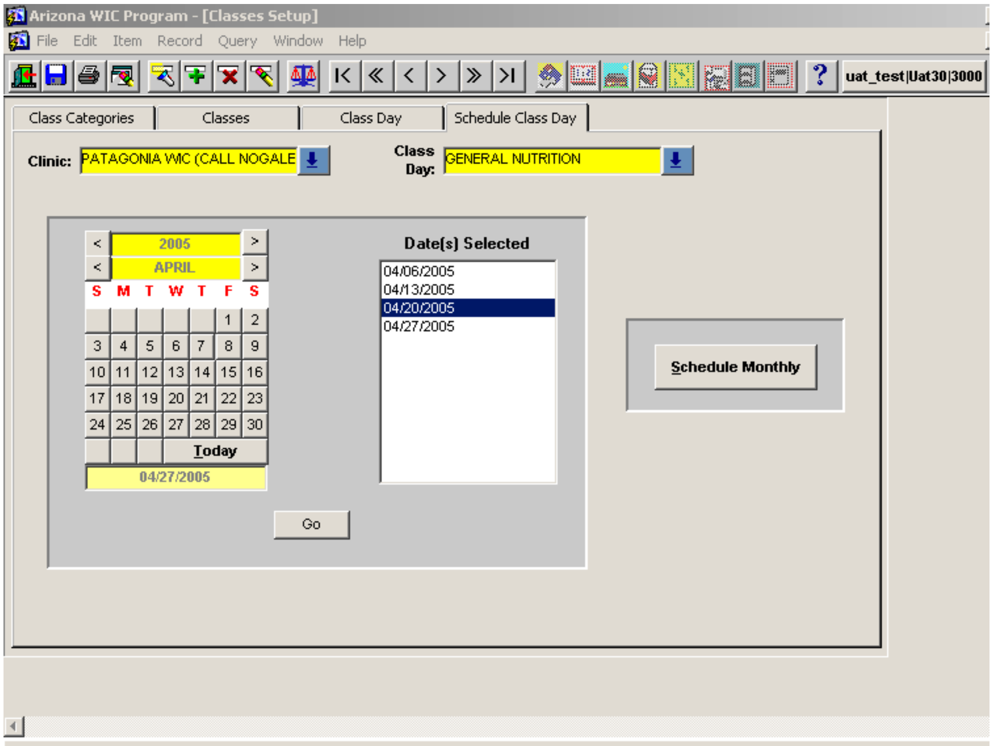



**Figure 49 – Schedule Class Day**

40. To remove a date from the Date(s) Selected field, simply double click the date in the Date(s) Selected column.
41. With date(s) selected, click the Go push button.
42. A message displays with the number of appointment slots created for the class day.

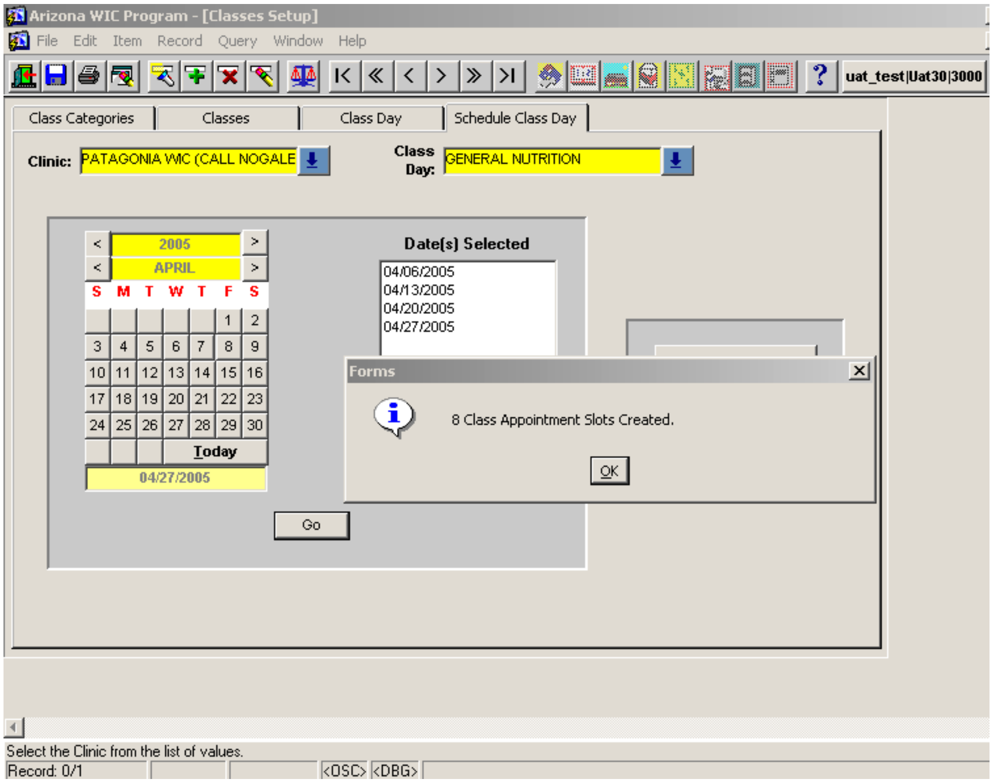



**Figure 50 - Classes Scheduled Daily**

43. Click OK to the message. Classes have been published to the appointment sheet where families can be scheduled.
44. The second method of publishing classes is by a monthly process.
45. Click the Monthly push button on the Schedule Class Day screen.
46. The cursor displays in the Year field. Enter a four-digit year.
47. Check the checkbox(es) for the month(s) desired to publish the classes.
48. Check the day(s) of the week the classes will be offered.

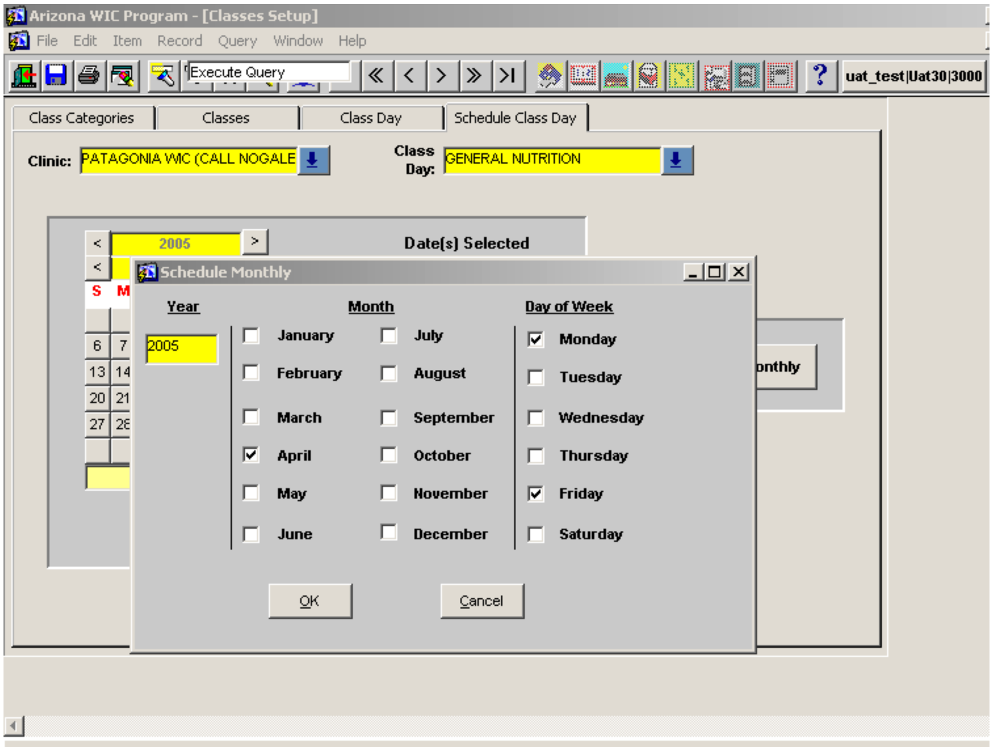



**Figure 51 - Classes Scheduled Monthly**

49. Click OK to start the publishing process or click Cancel to return to the Schedule Class Day screen.
50. A message displays indicating the number of class appointment slots created when the classes have been published to the appointment sheet.
51. The appointment scheduler and classes have been created and published. Click the Exit icon to return to the Appointment Scheduler Splash Screen.

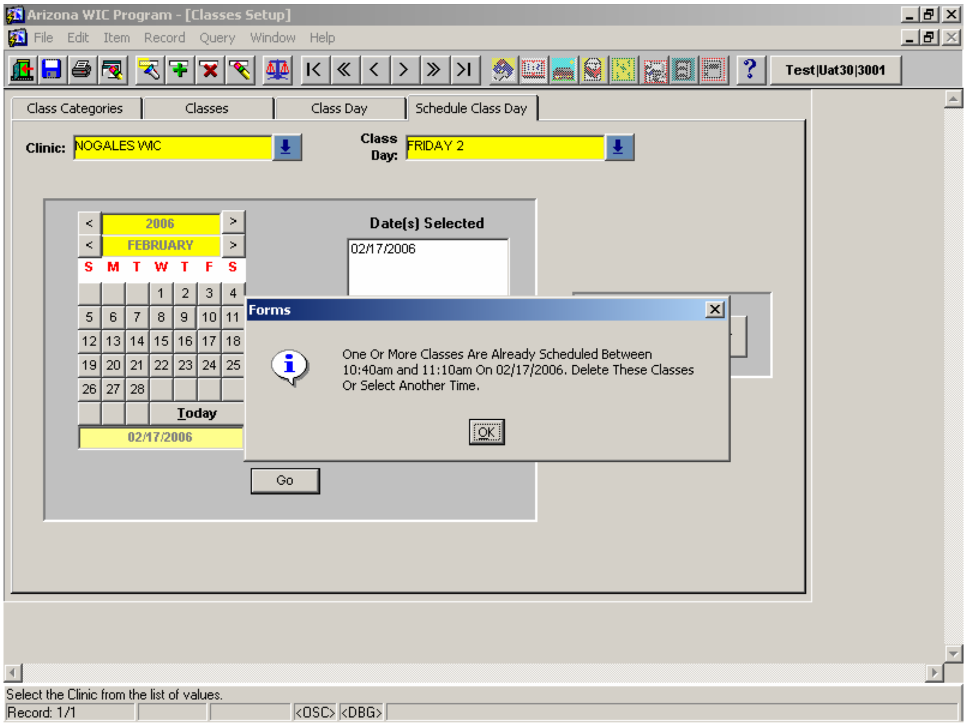



**Figure 52 – Schedule Class Day (Modify Class Time For Existing Classes Not Deleted)**

How the message is displayed when attempting to modify class times for existing classes on the appointment sheet

1. Click the Class Day tab.
2. Select a clinic and a class day; then select a specific class that has been published to the appointment sheet, in which to modify.
3. Modify the time of the class that falls within the incremental time determined in the Clinic Services and Activities screen of the Clinic Tables screen.
4. Click the Save icon.
5. Click the Schedule Class Day tab and select a date, or multiple dates to modify the class for.
6. Click GO to attempt to publish the class changes
7. A popup message displays that one or more classes are already scheduled, and to delete the class or select another time.
8. Click OK to the message and make modifications necessary to publish the class to the appointment sheet.
9. To delete the class and apply class changes to the appointment sheet , refer to the Appointments section on how to Delete a Class.

*Figure 46 - Maintain Class Categories*

*Fields*
**Class Category-** The code for displaying the name of the class category. This field is mandatory.
**Description** - The user-entered description of the name of the category. This field is mandatory.
**Comment -** The user may provide any comments or remarks. This field is optional.

*Figure 47 - Maintain Classes*

*Fields*
**Class Name –** The name of the class offered within the Local Agency corresponding with the class category. This field is mandatory.
**Class Category-** The code for displaying the name of the class category. This field is mandatory.
**Language-** The language spoken for the class offered. This field is optional.
**Staff-** The unique staff id number designated in Staff Data. This field is optional.
**Last Name-** The last name of the staff member associated with the staff id number. This field is display only.
**First Name** – The first name of the staff member associated with the staff id number. This field is display only.
**Class Limit-** The maximum number of unique families that will be scheduled to the class. This field is optional.
**Start Time-** The time the class begins. It is in the format; HH:MM AM or HH:MM PM. This field is optional.
**End Time-** The time the class ends. It is in the format; HH:MM AM or HH:MM PM. This field is optional.
**Comment –** The field is for user comments or remarks. The field is optional.

*Figure 48 - Maintain Class Day*

*Fields*
**Clinic-** The clinic where the classes are offered and held. This field is mandatory.
**Class Day-** A grouping of the classes offered in the agency for a specific clinic. This field is mandatory.
**Class Category-** The code for displaying the name of the class category. This field is mandatory.
**Class Name –** The name of the class offered within the Local Agency corresponding with the class category. This field is mandatory.
**Start Time-** The time the class begins. It is in the format; HH:MM AM or HH:MM PM. This field is mandatory.
**End Time-** The time the class ends. It is in the format; HH:MM AM or HH:MM PM. This field is mandatory.
**Staff-** The last name and first name of the staff member associated with the staff id number. This field is mandatory.
**Language-** The language spoken for the class offered. This field is mandatory.
**Class Limit-** The maximum number of unique families that will be scheduled to the class. This field is mandatory.

*Figure 50 - Classes Scheduled Daily*

*Fields*

**Clinic-** The clinic where the classes are offered and held. This field is mandatory.
**Class Day-** A grouping of the classes offered in the agency for a specific clinic. This field is mandatory.
**Date(s) Selected-** The selected dates to publish classes to the appointment sheet. This field is required.

*Push Button(s)*

**Calendar Buttons -** Press the date on the calendar for which the user would like to view appointment schedules from.
**Today** - Press the Today button to select today as the date on which appointments will be edited.
**> -** Indicates advancing to the next month(s) and year(s).
**< -** Indicates navigating to the previous month(s) and year(s).
**Go-** The process to publish the class day once the dates have been selected.

*Figure 51 - Classes Scheduled Monthly*

*Fields*

**Clinic-** The clinic where the classes are offered and held. This field is mandatory.
**Class Day-** A grouping of the classes offered in the agency for a specific clinic. This field is mandatory.
**Year-** The year entered in a four-digit format to publish classes monthly. This field is required.

*Push Button(s)*

**Schedule Monthly-** The process used to schedule class days for multiple months and days at once.
**OK-** The process to publish the class days monthly to the calendar.
**Cancel-** This function cancels the monthly selection and cancels the popup.

*Figure 52 – Schedule Class Day (Modify Class Time For Existing Classes Not Deleted)*

*Push Button(s)*

**OK** – Closes the informative popup message and returns the user to the Schedule Class Day screen.

# Outputs

## *Producing Mailing Labels*

This window allows the user to select which clients will have mailing labels printed for them based on the appointment search. The user can search for appointments based on clinic, appointment date, attendance, category and/or service. The clinic and appointment dates are mandatory and an additional combination of the remaining criteria fields is optional.

To Produce Mailing Labels:

1. Click on Outputs from the menu bar.
2. Position the cursor on Labels; the sub-menu is displayed.
3. Click on Appointment Label Selection as shown below:


The Appointment Label Selection Window is displayed:

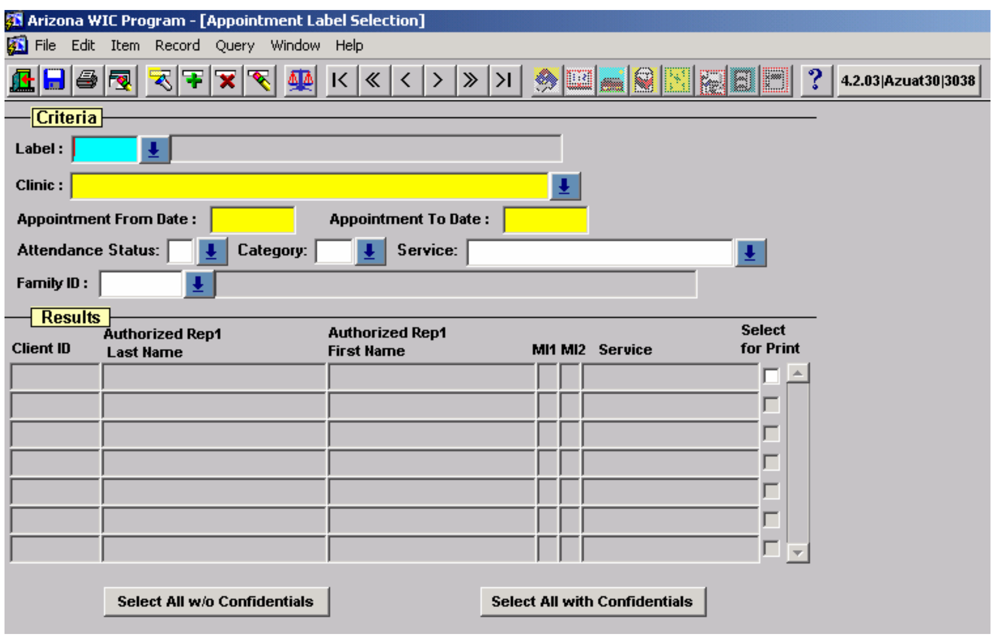
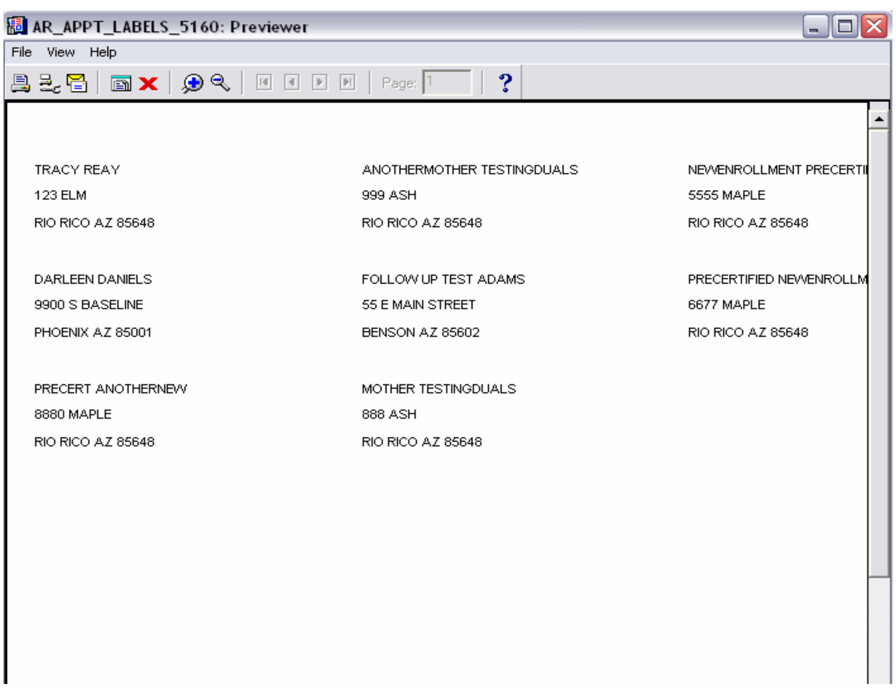



**Figure 53 - Appointment Label Selection**

Produce Appointment Label Selection

1. Click on the down arrow in the Label field to active the 'Label Stocks' pop-up. Select the desired label.
2. Click on the down arrow in the Clinic field to activate the drop down box, then select which clinic for which the system will search and display the clients in the Results section for the Appointment Labels Selection report by clicking that clinic's name. The Clinics available for selection will be based on the users Log-On.
3. TAB to the Appointment Date field. Enter the Appointment Date for which day of the selected clinics you wish to display in the Results section.
4. If appropriate, you may further narrow your search by increasing the completion of the remaining selection criteria of any or all of the following fields: Attendance Status, Category, Service and/or Family ID. To complete the fields, TAB to the field, click on the down arrow, and select the appropriate response.
5. Click on the Query icon and the system will populate the Results section with the appropriate clients who have appointments matching the information entered into the Criteria section. Use the scroll bar to the right to move forward and backward through the client selections.
6. Choose one of the following ways to select which clients will have labels printed:
   A. Individually choose a specific client(s) by marking the Select for Print checkbox next to the appropriate client.
   B. Choose to print labels for all clients except those with a confidentially flag checked in their Certification record by clicking on the Select All with Confidentials push button located at the bottom right hand side of the window.
   C. Choose to print labels for all clients with a confidentially flag checked in their Certification record by clicking on the Select All w/o Confidentials push button located at the bottom left hand side of the window.
7. Click the Print icon, once the appropriate clients have been selected. The system will automatically print the labels on the designated label printer.

Sample of Mailing Label



8. Close the window by selecting close from the File Menu on the toolbar and return to the Appointment Scheduler Menu Screen.

*Fields*

**Label** – Offers a choice of Avery printer labels: 5160 – HP 3x10 and 5163 HP 2x5. This field is mandatory.
**Clinic -** Clicking on the list of values button allows the user to select a clinic to be reported on. This field is mandatory.
**Appointment From Date -** The start date of appointments for which the labels are generated. This field is mandatory.
**Appointment To Date -** The end date of appointments for which the labels are generated. This field is mandatory.
**Attendance Status -** Clicking the list of values button allows the user to select the type of appointment status (kept, missed, pending) to query on. This field is optional.
**Category -** Clicking the list of values button allows the user to select the client category type to query on. This field is optional.
**Service -** Clicking the list of values button allows the user to select the appointment service type to query on. This field is optional.
**Family ID** – The identification number of the family to query on. This field is optional.
**Client ID -** The identification number of the client for the client record returned by the query. This field is display only.
**Authorized Rep1 Last Name -** The last name of the authorized representative for the client. This field is displayed from the Client ID. This field is display only.
**Authorized Rep1 First Name -** The first name of the authorized representative for the client. This field is displayed from the Client ID. This field is display only.
**MI1 -** The first middle initial of the authorized representative for the client. This field is displayed from the Client ID. This field is display only.
**MI2-** The second middle initial of the authorized representative for the client. This field is displayed from the Client ID. This field is display only. This field is display only.
**Service -** The service or activity for the client appointment record returned by the query.

*Check Box(es)*

**Select for Print -** Checking this box selects this client to have a label printed. This is required.

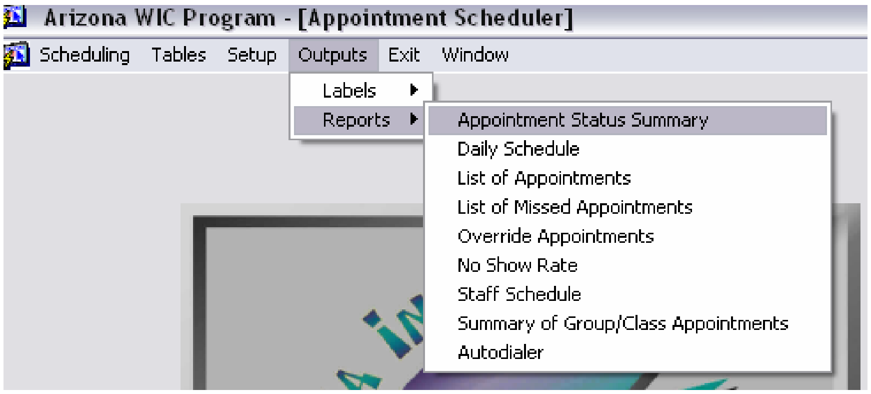
*Push Button(s)*

**Select All w/o Confidentials -** Clicking this button selects labels to print for all clients without a confidential flag selected in their certification record.
**Select All with Confidentials -** Clicking this button selects labels to print for all clients with a confidential flag selected in their certification record.

### *Producing an Appointment Status Summary Report*

This report provides a summary of appointment services for a user defined date range, which has been missed/kept, sorted by clients and the assigned staff members.

1. Click on Outputs from the menu bar.
2. Position the cursor on Reports; the reports sub-menu is displayed.
3. Click on Appointment Status Summary as shown below:




The Appointment Status Summary Window is displayed:

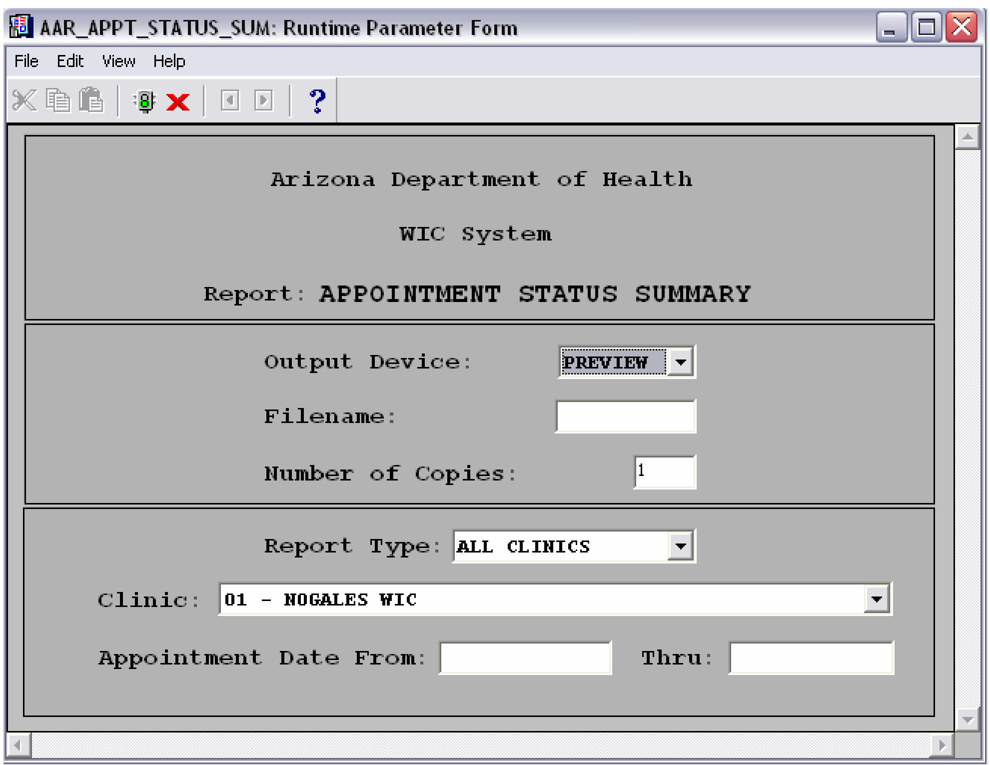
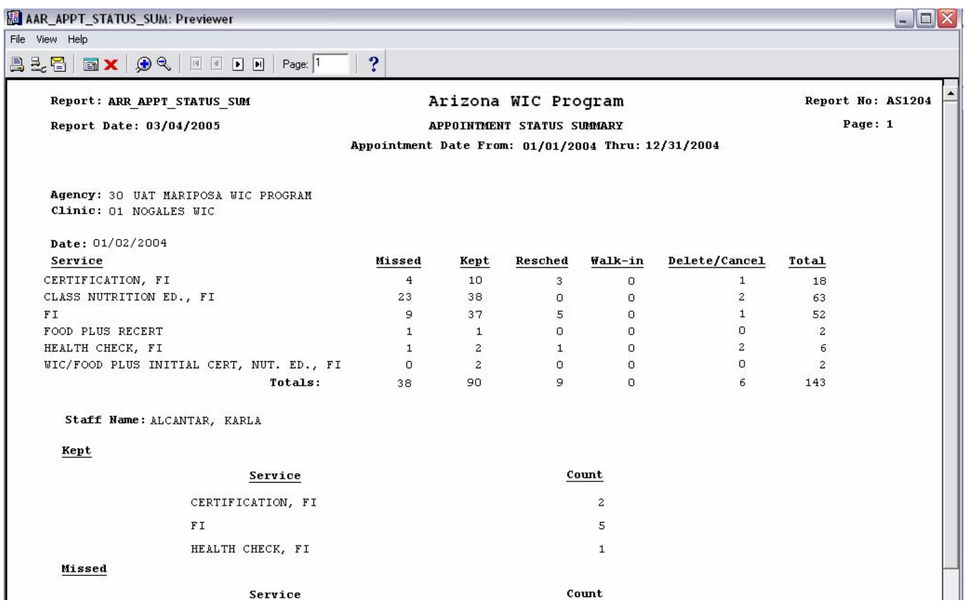



**Figure 54 - Appointment Status Summary**

Produce a Appointment Status Summary Report

1. Click the down arrow in the Output Device field to activate the drop down box, then select which output device the Appointment Status Summary report will be sent by clicking that device name.
2. TAB to the Filename field if File was selected as the Output device. Enter the filename to give to the report being generated.
3. TAB to the Number of Copies field. Select the number of report copies desired by typing that number in the field.
4. Click the down arrow in the Report Type field to activate the drop down box, then select whether to display appointments for all clinics or for a single clinic by clicking on the correct type.
5. If a "Clinic" Type was selected, click on the list of values to the right of the Clinic field to select a specific clinic. The clinics available for selection are based on the user log on.
6. TAB to the Appointment Date From field and enter the date that the report will be generated from.
7. TAB to the Thru field and enter the date that the report will be generated to.
8. Click the green light icon to bring up the preview screen shown below:




Report: ARR_APPT_STATUS_SUM
Arizona WIC Program
Report No: AS1204
Report Date: 03/04/2005
APPOINTMENT STATUS SUMMARY
Page: 1
Appointment Date From: 01/01/2004 Thru: 12/31/2004

Agency: 30 UAT MARIPOSA WIC PROGRAM
Clinic: 01 NOGALES WIC

Date: 01/02/2004

| Service | Missed | Kept | Resched | Walk-in | Delete/Cancel | Total |
|---|---|---|---|---|---|---|
| CERTIFICATION, FI | 4 | 10 | 3 | 0 | 1 | 18 |
| CLASS NUTRITION ED., FI | 23 | 38 | 0 | 0 | 2 | 63 |
| FI | 9 | 37 | 5 | 0 | 1 | 52 |
| FOOD PLUS RECERT | 1 | 1 | 0 | 0 | 0 | 2 |
| HEALTH CHECK, FI | 1 | 2 | 1 | 0 | 2 | 6 |
| WIC/FOOD PLUS INITIAL CERT, NUT. ED., FI | 0 | 2 | 0 | 0 | 0 | 2 |
| Totals: | 38 | 90 | 9 | 0 | 6 | 143 |

Staff Name: ALCANTAR, KARLA

Kept

| Service | Count |
|---|---|
| CERTIFICATION, FI | 2 |
| FI | 5 |
| HEALTH CHECK, FI | 1 |

Missed

| Service | Count |
|---|---|

Sample List of Missed/Kept Appointments SummaryReport

9. Click the Previous, Next, First, Last, and Page icons at the top of the screen to move forward and backward through the report pages.
10. Click the Print icon to print the report. To activate the system's e-mail capabilities, click the Mail icon. The mail function is not currently available in the AIM system.
11. Click the Close icon to exit the preview screen and return to the Appointment Scheduler Menu Screen.
12. Click the New icon to view a new copy of the same preview screen.

*Fields*

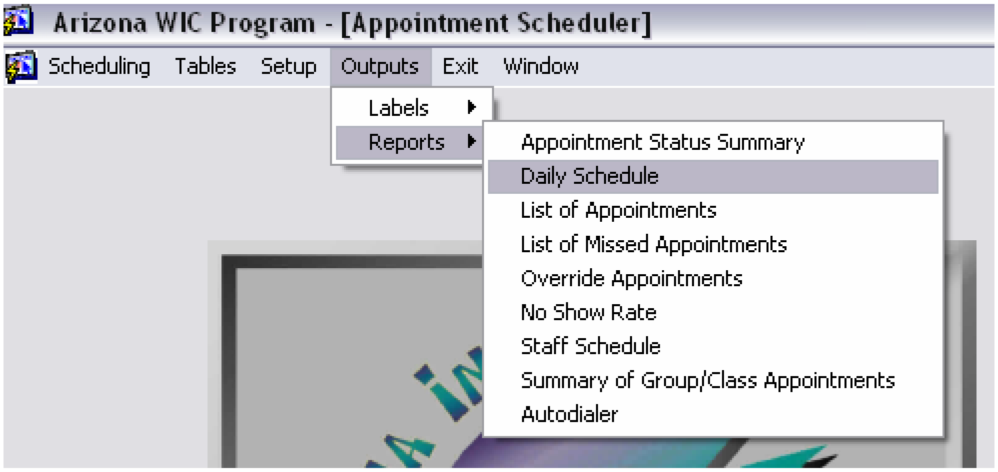
**Output Device -** The user may select (from a drop down list) screen, file, printer, mail or preview.
**Filename -** If file is selected (above), the directory and filename are entered. This field is mandatory if the file is selected as the Output device.
**Number of Copies -** If printer is selected (above) the number of copies desired is entered.
**Report Type -**
**Clinic -** If "Clinic" Report Type is selected, clicking on this list of values button allows the user to select the clinic. This field is mandatory if "Clinic" is selected as the Report Type.
**Appointment Date From-** The user may enter the earliest date that the report will select records on.
**Thru -** The user may enter the latest date that the report will select records on.

*Calculations*

### *Producing a Daily Schedule Report*

This report displays a list of appointments scheduled for the selected day.

1. Click on Outputs from the menu bar.
2. Position the cursor on Reports; the reports sub-menu is displayed.
3. Click on Daily Schedule as shown below:




The Daily Schedule Window is displayed:

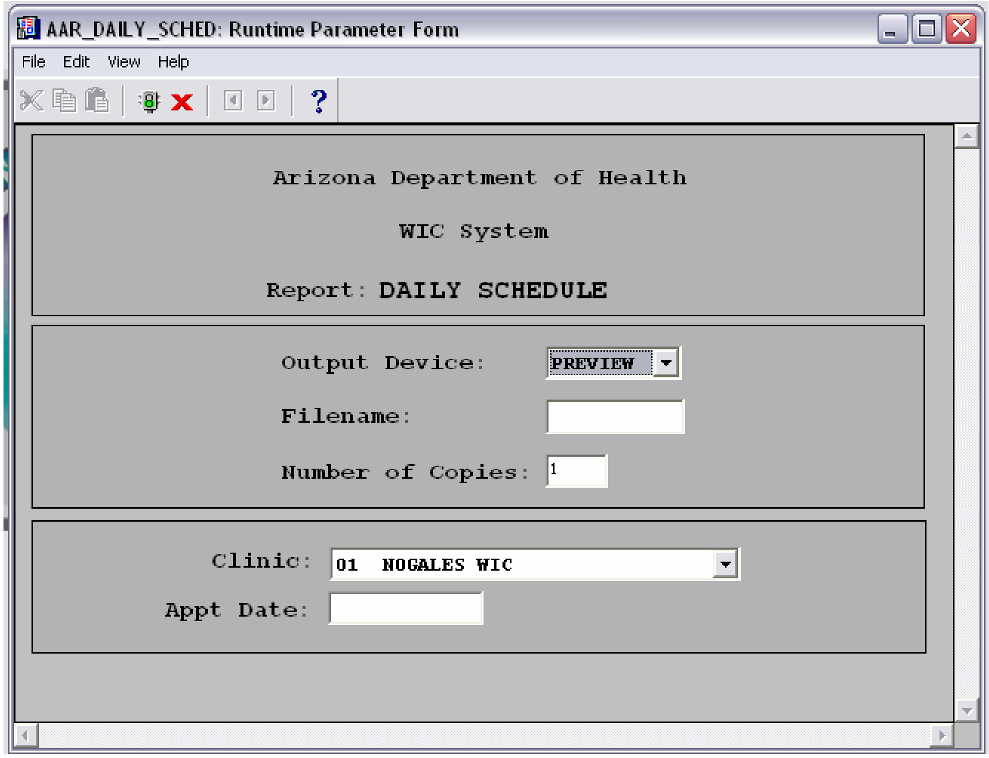
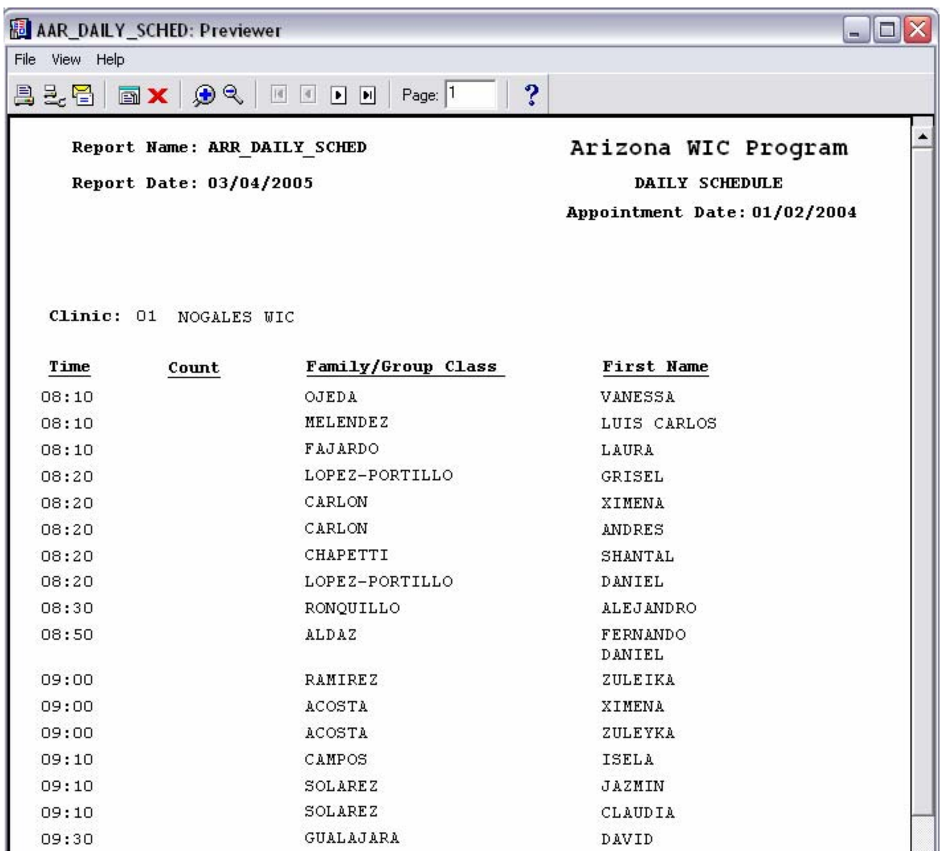



**Figure 55 - Daily Schedule**

Produce a Daily Schedule Report

1. Click the down arrow in the Output Device field to activate the drop down box, then select which output device the List of Appointments report will be sent by clicking that device name.
2. TAB to the Filename field if File was selected as the Output device. Enter the filename to give to the report being generated.
3. TAB to the Number of Copies field. Select the number of report copies desired by typing that number in the field.
4. Click on the list of values to the right of the Clinic field to select a specific clinic. The Clinics available for selection will be based on the users Log-On.
5. TAB to the Appt Date field and enter the date that the report will be generated for.
6. Click the green light icon to bring up the preview screen shown below:

Sample List of Appointments Report




Report Name: ARR_DAILY_SCHED
Report Date: 03/04/2005

Arizona WIC Program
DAILY SCHEDULE
Appointment Date: 01/02/2004

Clinic: 01 NOGALES WIC

| Time | Count | Family/Group Class | First Name |
|---|---|---|---|
| 08:10 | | OJEDA | VANESSA |
| 08:10 | | MELENDEZ | LUIS CARLOS |
| 08:10 | | FAJARDO | LAURA |
| 08:20 | | LOPEZ-PORTILLO | GRISEL |
| 08:20 | | CARLON | XIMENA |
| 08:20 | | CARLON | ANDRES |
| 08:20 | | CHAPETTI | SHANTAL |
| 08:20 | | LOPEZ-PORTILLO | DANIEL |
| 08:30 | | RONQUILLO | ALEJANDRO |
| 08:50 | | ALDAZ | FERNANDO DANIEL |
| 09:00 | | RAMIREZ | ZULEIKA |
| 09:00 | | ACOSTA | XIMENA |
| 09:00 | | ACOSTA | ZULEYKA |
| 09:10 | | CAMPOS | ISELA |
| 09:10 | | SOLAREZ | JAZMIN |
| 09:10 | | SOLAREZ | CLAUDIA |
| 09:30 | | GUALAJARA | DAVID |

1. Click the Previous, Next, First, Last, and Page icons at the top of the screen to move forward and backward through the report pages.
2. Click the Print icon to print the report. To activate the system's e-mail capabilities, click the Mail icon. The mail function is not currently available in the AIM system.
3. Click the Close icon to exit the preview screen and return to the Appointment Scheduler Menu Screen.
4. Click the New icon to view a new copy of the same preview screen.

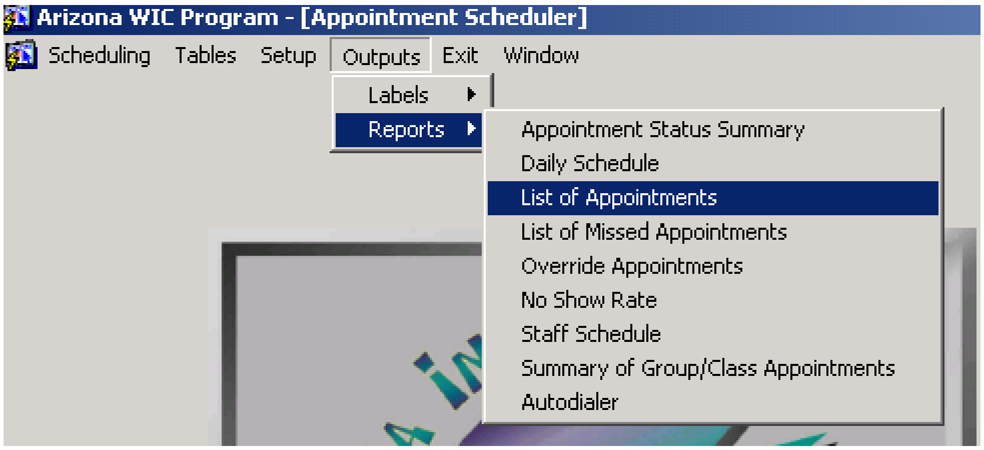
*Fields*

**Output Device -** The user may select (from a drop down list) screen, file, printer, mail, or preview.
**Filename -** If file is selected (above), the directory and filename are entered. This field is mandatory if the file is selected as the Output device.
**Number of Copies -** If printer is selected (above) the number of copies desired is entered.
**Report Type -** The user may select (from a drop down list) the type desired. This field is mandatory.
**Clinic -** If "Clinic" Report Type is selected, clicking on this list of values button allows the user to select the clinic. This field is mandatory if "Clinic" is selected as the Report Type.
**Appointment Date -** The user may enter the date that the report will select records on. This field is required.

### *Producing a List of Appointments Report*

This report displays a list of appointment data for a user defined date range for either all clinics or a single clinic within a Local Agency sorted by staff, times and services. This report shows both scheduled and open appointment slots.

1. Click on Outputs from the menu bar.
2. Position the cursor on Reports; the reports sub-menu is displayed.
3. Click on List of Appointments as shown below:




The List of Appointments Window is displayed:

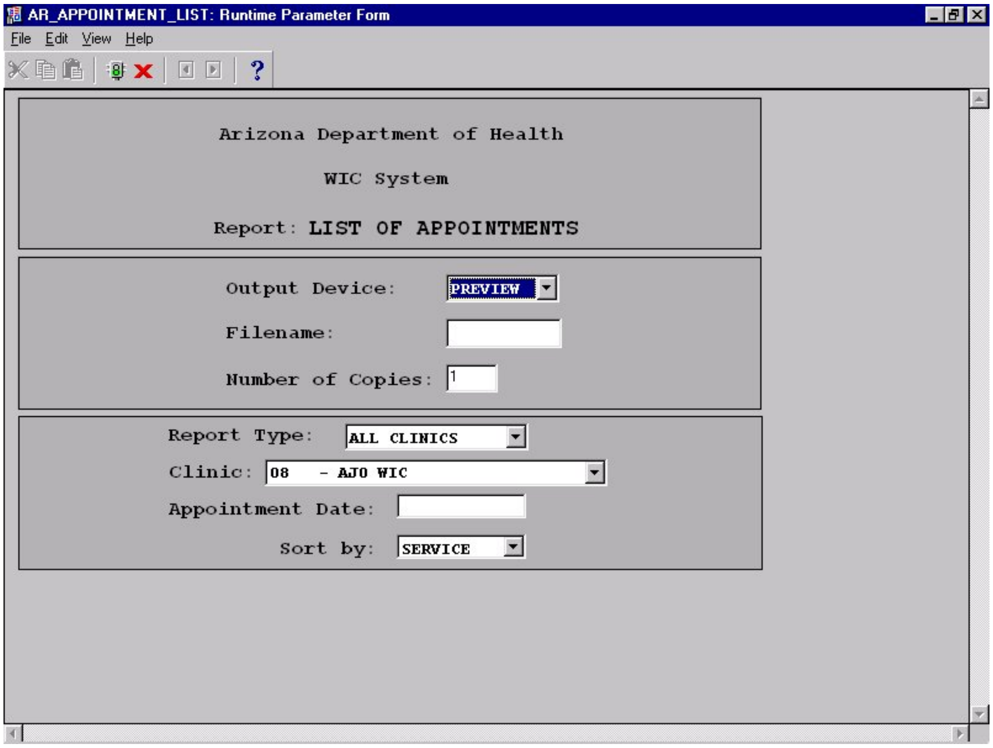
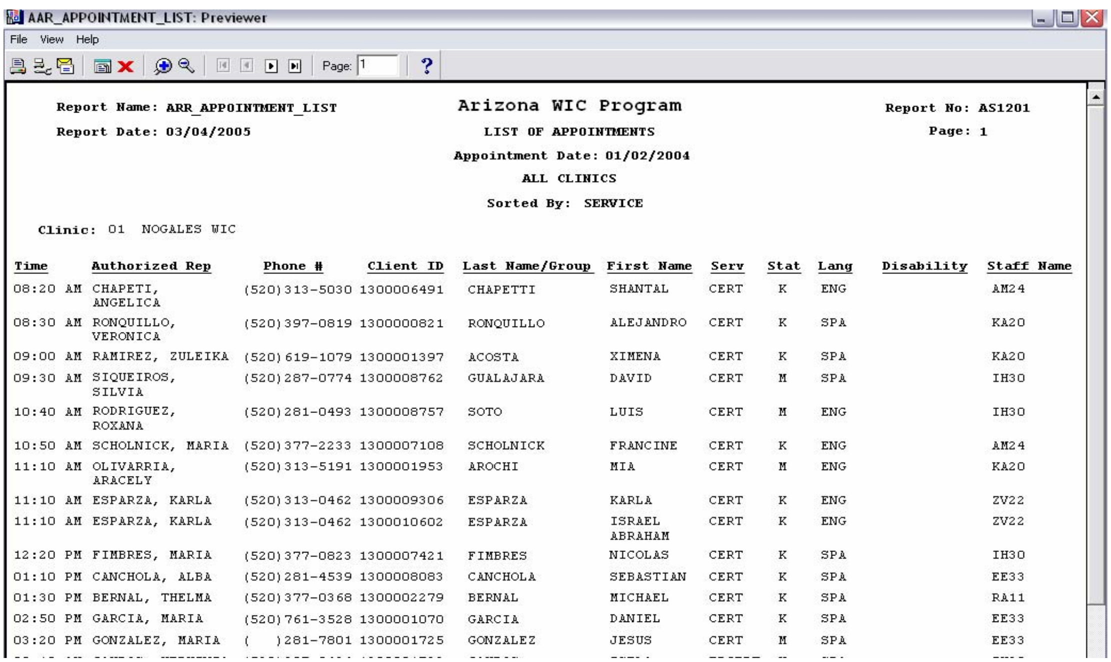



**Figure 56 - List of Appointments**

Produce a List of Appointments Report

4. Click the down arrow in the Output Device field to activate the drop down box, then select which output device the List of Appointments report will be sent by clicking that device name.
5. TAB to the Filename field if File was selected as the Output device. Enter the filename to give to the report being generated.
6. TAB to the Number of Copies field. Select the number of report copies desired by typing that number in the field.
7. Click the down arrow in the Report Type field to activate the drop down box, then select whether to display appointments for all clinics or for a single clinic by clicking on the correct type.
8. If a "Clinic" Type was selected, click on the list of values to the right of the Clinic field to select a specific clinic. The Clinics available for selection will be based on the users Log-On.
9. TAB to the Appointment Date field and enter the date that the report will be generated for.
10. Click on the list of values to the right of the Sort By field to select the method for the system to sort data by.
11. Click the green light icon to bring up the preview screen shown below:

Sample List of Appointments Report


AAR_APPOINTMENT_LIST: Previewer

File View Help

Page: 1

Report Name: ARR_APPOINTMENT_LIST

Report Date: 03/04/2005

Arizona WIC Program

LIST OF APPOINTMENTS

Appointment Date: 01/02/2004

ALL CLINICS

Sorted By: SERVICE

Report No: AS1201

Page: 1

Clinic: 01 NOGALES WIC

| Time | Authorized Rep | Phone # | Client ID | Last Name/Group | First Name | Serv | Stat | Lang | Disability | Staff Name |
|---|---|---|---|---|---|---|---|---|---|---|
| 08:20 AM | CHAPETI, ANGELICA | (520)313-5030 | 1300006491 | CHAPETTI | SHANTAL | CERT | K | ENG | | AM24 |
| 08:30 AM | RONQUILLO, VERONICA | (520)397-0819 | 1300000821 | RONQUILLO | ALEJANDRO | CERT | K | SPA | | KA20 |
| 09:00 AM | RAMIREZ, ZULEIKA | (520)619-1079 | 1300001397 | ACOSTA | XIMENA | CERT | K | SPA | | KA20 |
| 09:30 AM | SIQUEIROS, SILVIA | (520)287-0774 | 1300008762 | GUALAJARA | DAVID | CERT | M | SPA | | IH30 |
| 10:40 AM | RODRIGUEZ, ROXANA | (520)281-0493 | 1300008757 | SOTO | LUIS | CERT | M | ENG | | IH30 |
| 10:50 AM | SCHOLNICK, MARIA | (520)377-2233 | 1300007108 | SCHOLNICK | FRANCINE | CERT | K | ENG | | AM24 |
| 11:10 AM | OLIVARRIA, ARACELY | (520)313-5191 | 1300001953 | AROCHI | MIA | CERT | M | ENG | | KA20 |
| 11:10 AM | ESPARZA, KARLA | (520)313-0462 | 1300009306 | ESPARZA | KARLA | CERT | K | ENG | | ZV22 |
| 11:10 AM | ESPARZA, KARLA | (520)313-0462 | 1300010602 | ESPARZA | ISRAEL ABRAHAM | CERT | K | ENG | | ZV22 |
| 12:20 PM | FIMBRES, MARIA | (520)377-0823 | 1300007421 | FIMBRES | NICOLAS | CERT | K | SPA | | IH30 |
| 01:10 PM | CANCHOLA, ALBA | (520)281-4539 | 1300008083 | CANCHOLA | SEBASTIAN | CERT | K | SPA | | EE33 |
| 01:30 PM | BERNAL, THELMA | (520)377-0368 | 1300002279 | BERNAL | MICHAEL | CERT | K | SPA | | RA11 |
| 02:50 PM | GARCIA, MARIA | (520)761-3528 | 1300001070 | GARCIA | DANIEL | CERT | K | SPA | | EE33 |
| 03:20 PM | GONZALEZ, MARIA | ( )281-7801 | 1300001725 | GONZALEZ | JESUS | CERT | M | SPA | | EE33 |

5. Click the Previous, Next, First, Last, and Page icons at the top of the screen to move forward and backward through the report pages.
6. Click the Print icon to print the report. To activate the system's e-mail capabilities, click the Mail icon. The mail function is not currently available in the AIM system.
7. Click the Close icon to exit the preview screen and return to the Appointment Scheduler Menu Screen.
8. Click the New icon to view a new copy of the same preview screen.

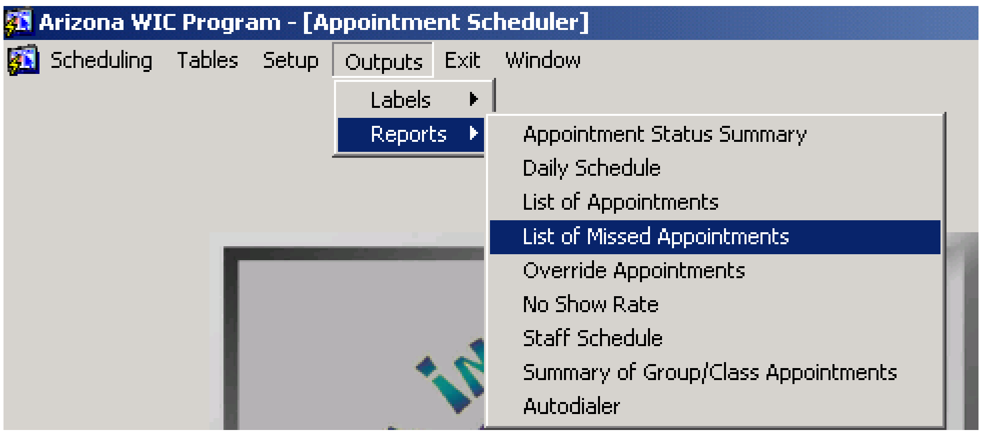
*Fields*

**Output Device -** The user may select (from a drop down list) screen, file, printer, mail, or preview.
**Filename -** If file is selected (above), the directory and filename are entered. This field is mandatory if the file is selected as the Output device.
**Number of Copies -** If printer is selected (above) the number of copies desired is entered.
**Report Type -** The user may select (from a drop down list) the type desired. This field is mandatory.
**Clinic -** If “Clinic” Report Type is selected, clicking on this list of values button allows the user to select the clinic. This field is mandatory if “Clinic” is selected as the Report Type.
**Appointment Date -** The user may enter the date that the report will select records on. This is required.
**Sort By -** The user may select the method by which the system will sort data by to generate the report.

### *Producing a List of Missed Appointments Report*

This report displays a list of appointments for a user defined date range which have been missed and sorted by: clinic, staff or time or service, client, date, and start time, along with details about the client. This report also provides a history of missed appointment. This report can function as a contact and mailing confidentially flags as appropriate. If a client has confidentiality checked on their Certification record, the term “no phone calls” will display.

1. Click on Outputs from the menu bar.
2. Position the cursor on Reports, the reports sub-menu is displayed.
3. Click on List of Missed Appointments as shown below:




The List of Missed Appointments Window is displayed:

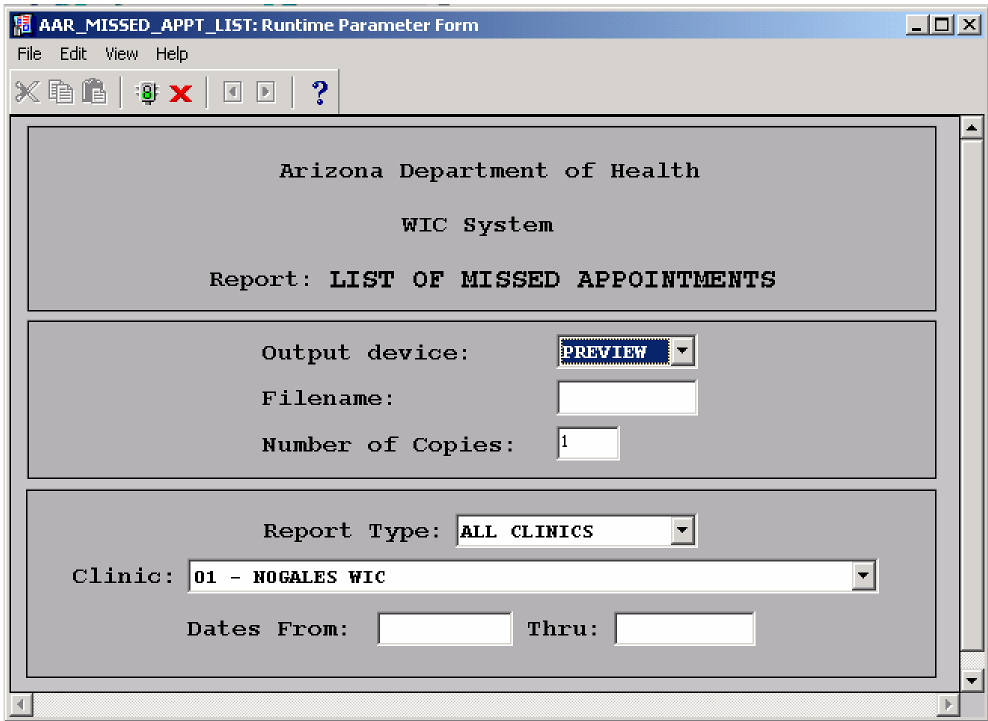
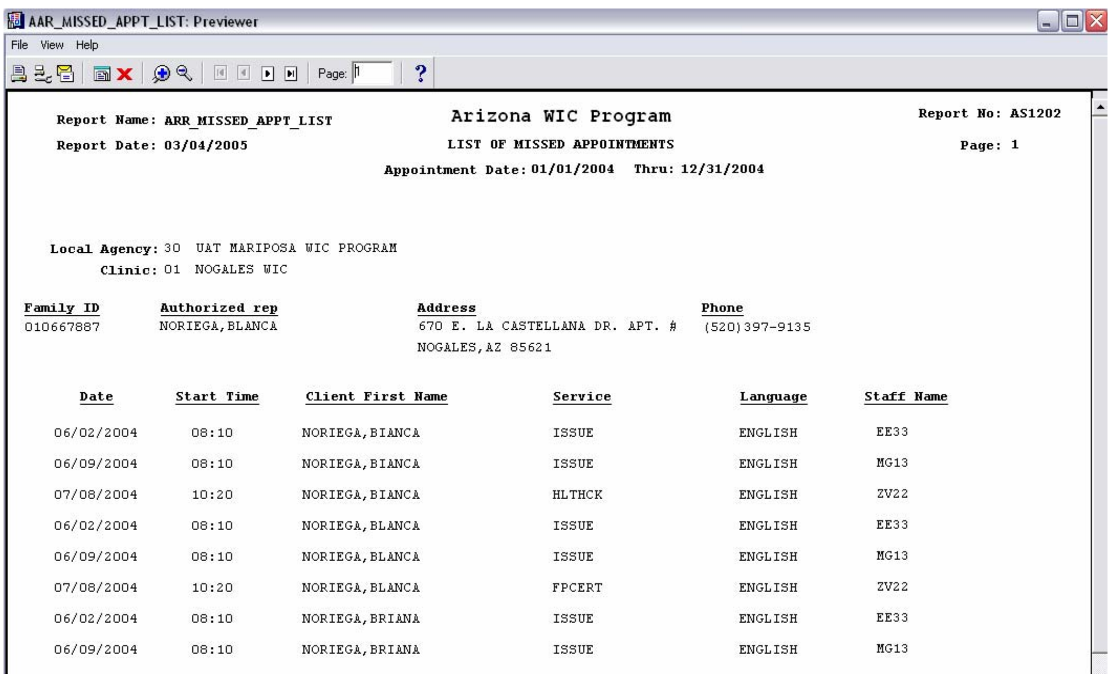



**Figure 57 - List of Missed Appointments**

Produce a List of Missed Appointments Report

1. Click the down arrow in the Output Device field to activate the drop down box, then select which output device the List of Missed Appointments report will be sent by clicking that device name.
2. TAB to the Filename field if File was selected as the Output device. Enter the filename to give to the report being generated.
3. TAB to the Number of Copies field. Select the number of report copies desired by typing that number in the field.
4. Click the down arrow in the Report Type field to activate the drop down box, then select whether to display appointments for all clinics or for a single clinic by clicking on the correct type.
5. If a "Clinic" Type was selected, click on the list of values to the right of the Clinic field to select a specific clinic. The Clinics available for selection will be based on the users Log-On.
6. TAB to the Dates From field and enter the date that the report will be generated from.
7. TAB to the Dates To field and enter the date that the report will be generated to.
8. Click the green light icon to bring up the preview screen shown below:

Sample List of Missed Appointments Report




Report Name: ARR_MISSED_APPT_LIST
Report Date: 03/04/2005
Arizona WIC Program
LIST OF MISSED APPOINTMENTS
Appointment Date: 01/01/2004 Thru: 12/31/2004
Report No: AS1202
Page: 1

Local Agency: 30 UAT MARIPOSA WIC PROGRAM
Clinic: 01 NOGALES WIC

| Family ID | Authorized rep | Address | Phone |
|---|---|---|---|
| 010667887 | NORIEGA,BLANCA | 670 E. LA CASTELLANA DR. APT. #<br>NOGALES,AZ 85621 | (520)397-9135 |

| Date | Start Time | Client First Name | Service | Language | Staff Name |
|---|---|---|---|---|---|
| 06/02/2004 | 08:10 | NORIEGA,BIANCA | ISSUE | ENGLISH | EE33 |
| 06/09/2004 | 08:10 | NORIEGA,BIANCA | ISSUE | ENGLISH | MG13 |
| 07/08/2004 | 10:20 | NORIEGA,BIANCA | HLTHCK | ENGLISH | ZV22 |
| 06/02/2004 | 08:10 | NORIEGA,BLANCA | ISSUE | ENGLISH | EE33 |
| 06/09/2004 | 08:10 | NORIEGA,BLANCA | ISSUE | ENGLISH | MG13 |
| 07/08/2004 | 10:20 | NORIEGA,BLANCA | FPCERT | ENGLISH | ZV22 |
| 06/02/2004 | 08:10 | NORIEGA,BRIANA | ISSUE | ENGLISH | EE33 |
| 06/09/2004 | 08:10 | NORIEGA,BRIANA | ISSUE | ENGLISH | MG13 |

9. Click the Previous, Next, First, Last, and Page icon at the top of the screen to move forward and backward through the report pages.
10. Click the Print icon to print the report. To activate the system's e-mail capabilities, click the Mail button. The mail function is not currently available in the AIM system.
11. Click the Close icon to exit the preview screen and return to the Appointment Scheduler Menu Screen.
12. Click the New icon to view a new copy of the same preview screen.

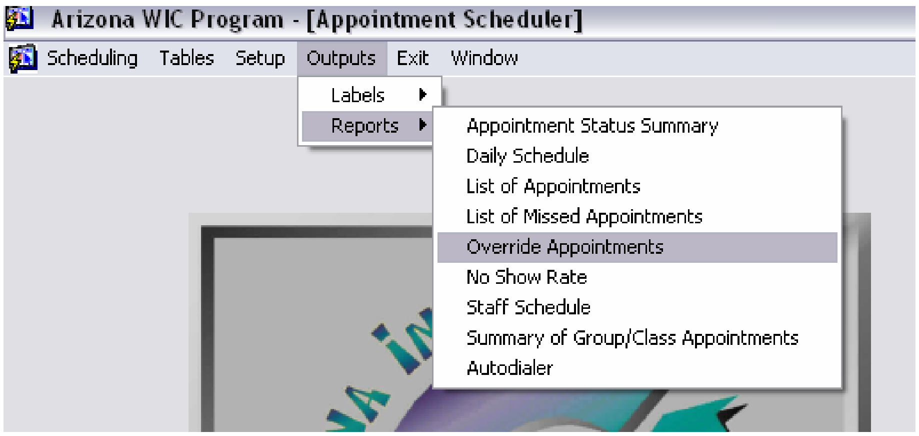
*Fields*

**Output Device -** The user may select (from a drop down list) screen, file, printer, mail, or preview.
**Filename -** If file is selected (above), the directory and filename are entered. This field is mandatory if the file is selected as the Output device.
**Number of Copies -** If printer is selected (above) the number of copies desired is entered.
**Report Type -** The user may select (from a drop down list) the type desired.
**Clinic** - If “Clinic” Report Type is selected, clicking on this list of values button allows the user to select the clinic. This field is mandatory if “Clinic” is selected as the Report Type.
**Dates From -** The user may enter the earliest date that the report will select records on. This field is required.
**Dates Thru -** The user may enter the latest date that the report will select records on. This field is required.

### *Producing an Override Appointments Report*

This report displays any appointments that were overridden by users. Included in these are: Appointments that had a different service assigned than the one that was scheduled for that slot, Appointments in which the primary language of the staff member and Family do not match, and Appointments that were scheduled outside the Federal Processing Standards Guideline.

1. Click on Outputs from the menu bar.
2. Position the cursor on Reports; the reports sub-menu is displayed.
3. Click on Override Appointments as shown below:




The Appointment Overrides Window is displayed:

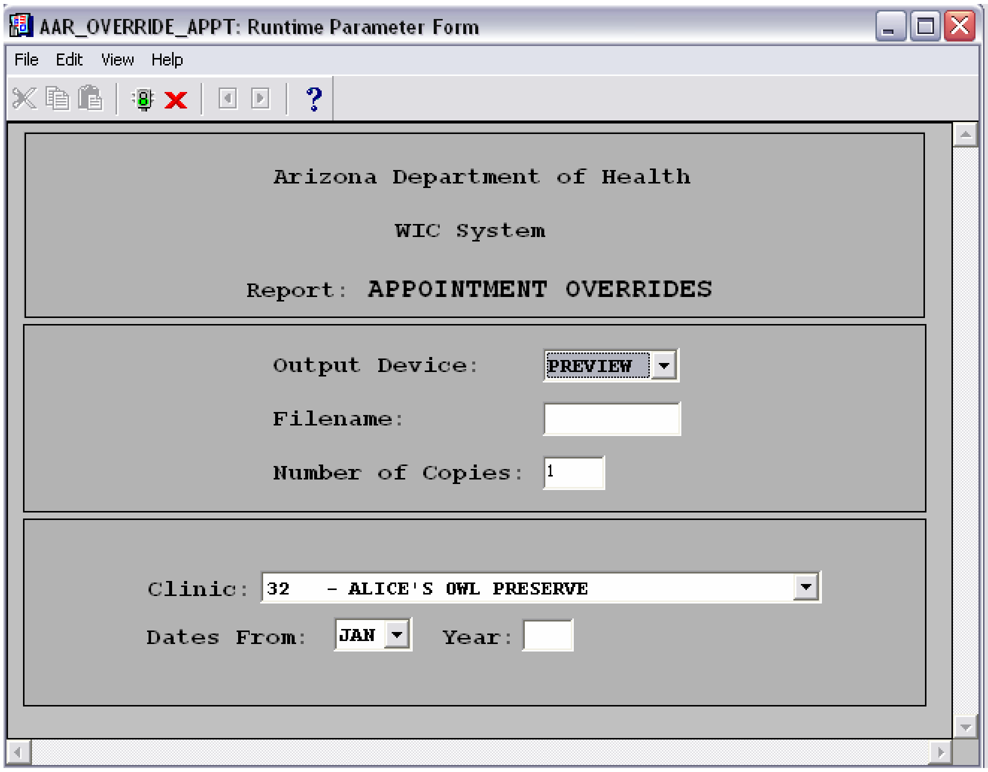
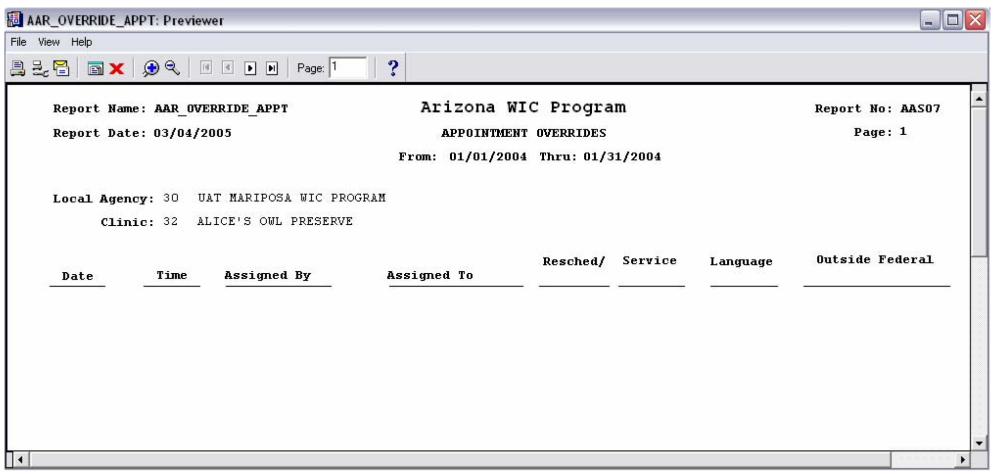



**Figure 58 - Appointment Override**

Produce a Daily Schedule Report

1. Click the down arrow in the Output Device field to activate the drop down box, then select which output device the List of Appointments report will be sent by clicking the device name.
2. TAB to the Filename field if File was selected as the Output device. Enter the filename to give to the report being generated.
3. TAB to the Number of Copies field. Select the number of report copies desired by typing that number in the field.
4. Click on the list of values to the right of the Clinic field to select a specific clinic. The Clinics available for selection will be based on the users Log-On.
5. TAB to the Dates From field and select month that the report will be generated for.
6. TAB to the Year field and enter year that the report will be generated for.
7. Click the green light icon to bring up the preview screen shown below:

Sample Appointment Override Report




9. Click the Previous, Next, First, Last, and Page icons at the top of the screen to move forward and backward through the report pages.
10. Click the Print icon to print the report. To activate the system's e-mail capabilities, click the Mail icon. The mail function is not currently available in the AIM system.
11. Click the Close icon to exit the preview screen and return to the Appointment Scheduler Menu Screen.
12. Click the New icon to view a new copy of the same preview screen.

*Fields*

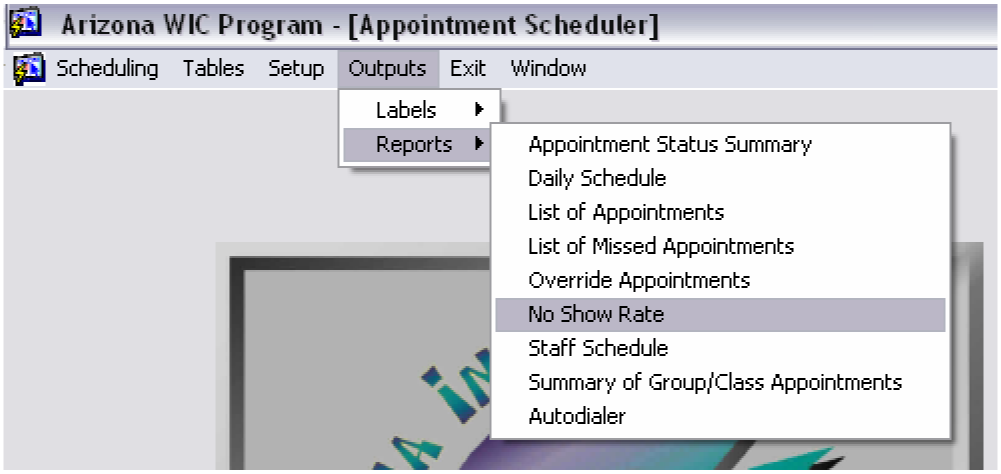
**Output Device -** The user may select (from a drop down list) screen, file, printer, mail, or preview.
**Filename -** If file is selected (above), the directory and filename are entered. This field is mandatory if the file is selected as the Output device.
**Number of Copies -** If printer is selected (above) the number of copies desired is entered.
**Report Type -** The user may select (from a drop down list) the type desired.
**Clinic -** If "Clinic" Report Type is selected, clicking on this list of values button allows the user to select the clinic. This field is mandatory if "Clinic" is selected as the Report Type.
**Dates From -** The user may enter the earliest month and year date that the report will select records on. This field is required.

**Year-** The four-digit year required to run the report. This field is required.

### *Producing a No Show Rate Report*

This report retrieves, calculates and displays The No Show Rate by service for all or a single clinic in a Local Agency for a selected month and year. The report included a duplicate count for people who are no-shows more than once for the month and year selected.

1. Click on Outputs from the menu bar.
2. Position the cursor on Reports; the reports sub-menu is displayed.
3. Click on No Show Rate as shown below:




The No Show Rate Window is displayed:

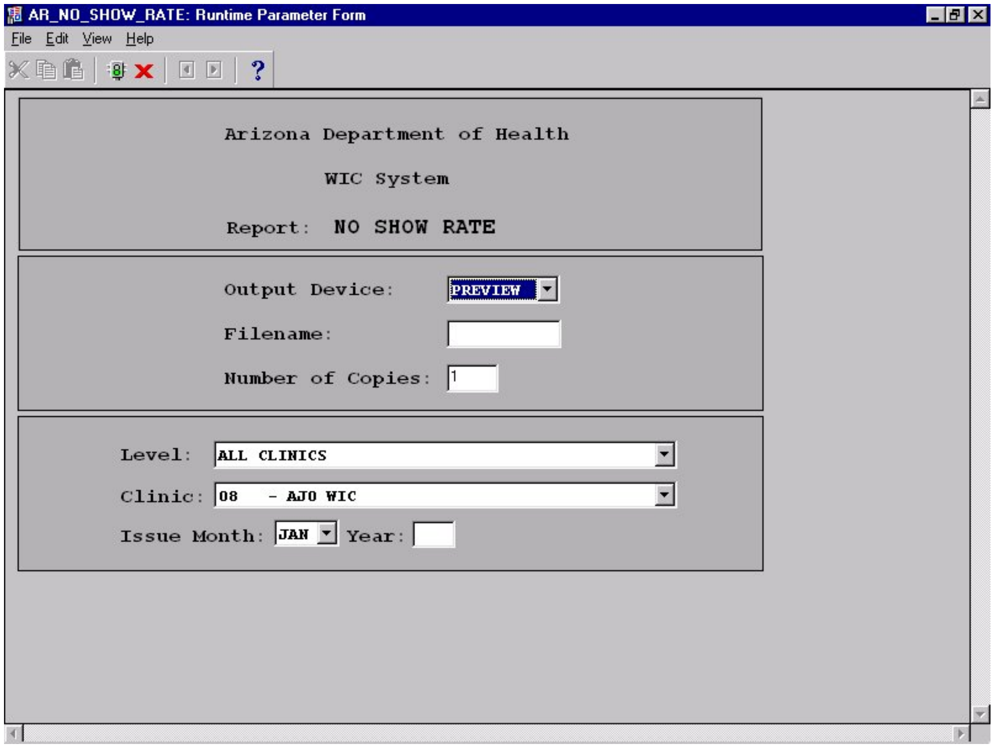
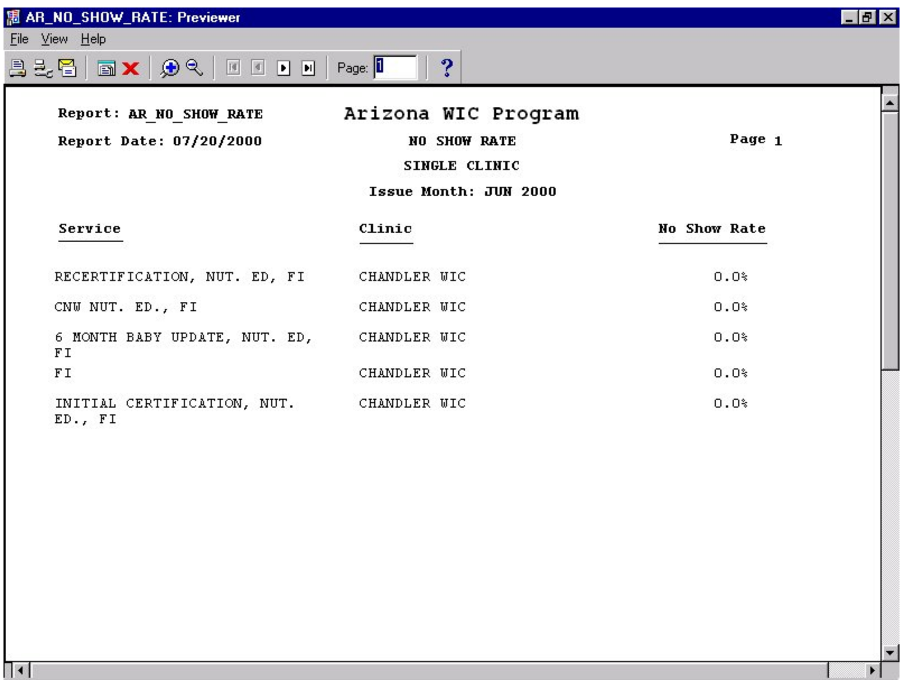



**Figure 59 - No Show Rate**

Produce a No Show Rate Report

1. Click the down arrow in the Output Device field to activate the drop down box, then select which output device the No Show Rate report will be sent by clicking that device name.
2. TAB to the Filename field if "File" was selected as the Output device. Enter the filename to give to the report being generated.
3. TAB to the Number of Copies field. Select the number of report copies desired by typing that number in the field.
4. Click the down arrow in the Level field to activate the drop down box, then select whether to display appointments for all clinics or for a single clinic by clicking on the correct level.
5. If Level "Clinic" was selected, click on the list of values to the right of the Clinic field to select a specific clinic. The clinics available for selection are based on the user's log on.
6. Click on the list of values to the right of the Issue Month field to select the month for the system to collect data.
7. TAB to the Year field and enter the year for the system to collect data.
8. Click the green light icon to bring up the preview screen shown below:




Sample No Show Rate Report

9. Click the Previous, Next, First, Last, and Page icons at the top of the screen to move forward and backward through the report pages.
10. Click the Print icon to print the report. To activate the system's e-mail capabilities, click the Mail icon. The mail function is not currently available in the AIM system.
11. Click the Close icon to exit the preview screen and return to the Appointment Scheduler Menu Screen.
12. Click the New icon to view a new copy of the same preview screen.

*Fields*

**Output Device -** The user may select (from a drop down list) screen, file, printer, mail or preview.
**Filename -** If file is selected (above), the directory and filename are entered.
**Number of Copies -** If printer is selected (above), the number of copies desired is entered.
**Level -** The user may select (from a drop down list) the level desired. This field is required.
**Clinic** - Clicking on this list of values button allows the user to select the clinic. This field is required.
**Issue Month -** The user may enter the earliest month that the report will select records on. This field is required.
**Year -** The user may enter the latest year that the report will select records on. This field is required.

*Calculations*

**No Show Rate –** (Clients with Missed Attendance Statuses/ Scheduled Client Appointments) X 100.

### *Producing a Staff Schedule Report*

This output creates a Staff Schedule report for a clinic, staff member, and/or language for a single date.

1. Click on Outputs from the menu bar.
2. Position the cursor on Reports; the reports sub-menu is displayed.
3. Click on Staff Schedule as shown below:


The Staff Schedule Window is displayed:

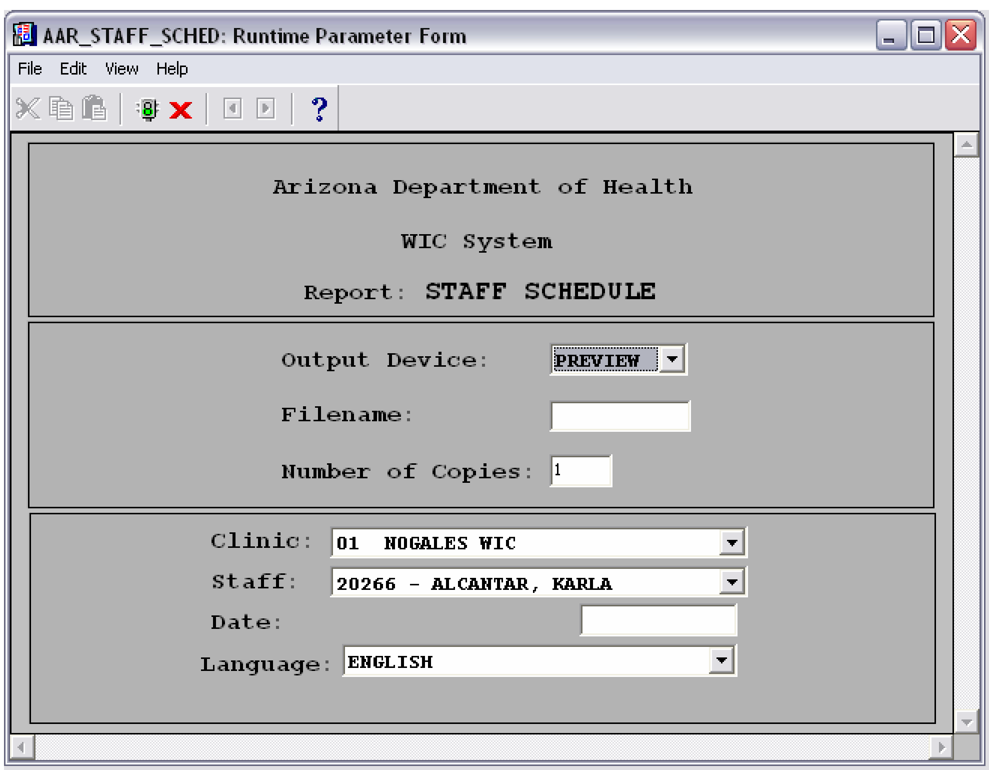
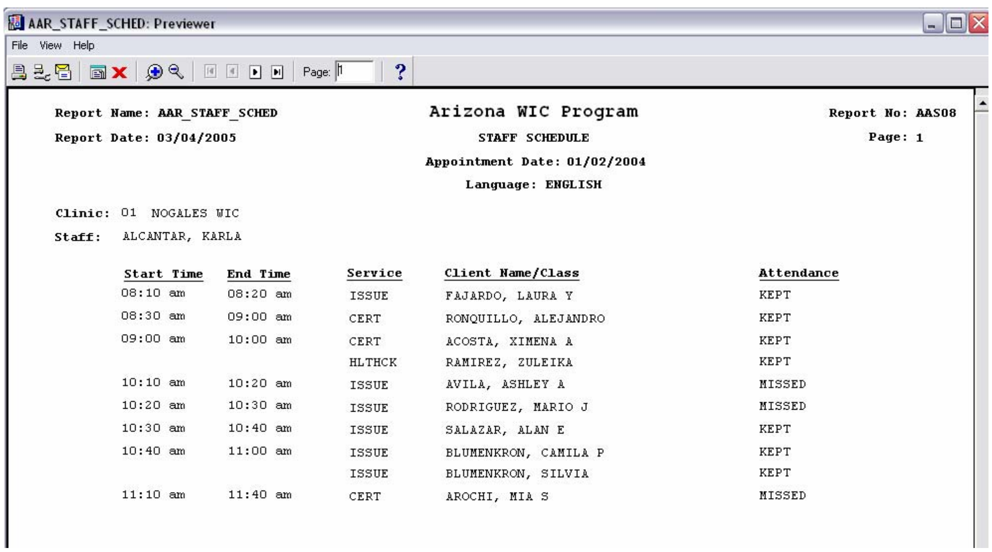



**Figure 60 - Staff Schedule**

Produce a No Show Rate Report

1. Click the down arrow in the Output Device field to activate the drop down box, then select which output device the No Show Rate report will be sent by clicking that device name.
4. TAB to the Filename field if “File” was selected as the Output device. Enter the filename to give to the report being generated.
5. TAB to the Number of Copies field. Select the number of report copies desired by typing that number in the field.
6. Click on the list of values to the right of the Clinic field to select a specific clinic. The Clinics available for selection will be based on the users Log-On.
7. Click on the list of values to the right of the Staff field to select a staff member.
8. TAB to the Date field and enter the date for the system to collect data.
9. Click on the list of values to the right of the Language field to select a language to hold the appointment in.
10. Click the green light icon to bring up the preview screen shown below:




Report Name: AAR_STAFF_SCHED
Report Date: 03/04/2005
Arizona WIC Program
STAFF SCHEDULE
Appointment Date: 01/02/2004
Language: ENGLISH
Report No: AAS08
Page: 1

Clinic: 01 NOGALES WIC
Staff: ALCANTAR, KARLA

| Start Time | End Time | Service | Client Name/Class | Attendance |
|---|---|---|---|---|
| 08:10 am | 08:20 am | ISSUE | FAJARDO, LAURA Y | KEPT |
| 08:30 am | 09:00 am | CERT | RONQUILLO, ALEJANDRO | KEPT |
| 09:00 am | 10:00 am | CERT | ACOSTA, XIMENA A | KEPT |
| | | HLTHCK | RAMIREZ, ZULEIKA | KEPT |
| 10:10 am | 10:20 am | ISSUE | AVILA, ASHLEY A | MISSED |
| 10:20 am | 10:30 am | ISSUE | RODRIGUEZ, MARIO J | MISSED |
| 10:30 am | 10:40 am | ISSUE | SALAZAR, ALAN E | KEPT |
| 10:40 am | 11:00 am | ISSUE | BLUMENKRON, CAMILA P | KEPT |
| | | ISSUE | BLUMENKRON, SILVIA | KEPT |
| 11:10 am | 11:40 am | CERT | AROCHI, MIA S | MISSED |

Sample No Show Rate Report

11. Click the Previous, Next, First, Last, and Page icons at the top of the screen to move forward and backward through the report pages.
12. Click the Print icon to print the report. To activate the system’s e-mail capabilities, click the Mail icon. The mail function is not currently available in the AIM system.
13. Click the Close icon to exit the preview screen and return to the Appointment Scheduler Menu Screen.
14. Click the New icon to view a new copy of the same preview screen.

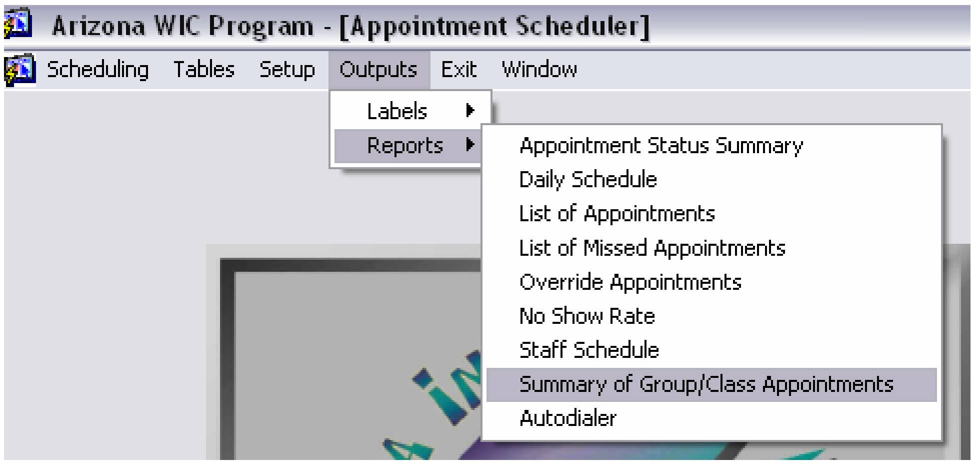
*Fields*

**Output Device -** The user may select (from a drop down list) screen, file, printer, mail or preview.
**Filename -** If file is selected (above), the directory and filename are entered.
**Number of Copies -** If printer is selected (above), the number of copies desired is entered.
**Clinic -** Clicking on this list of values button allows the user to select the clinic.
**Staff -** Clicking on this list of values button allows the user to select a staff member.
**Date -** The user may enter the date that the report will select records on. This field is required.
**Language -** Clicking on this list of values button allows the user to select a language.

### *Producing a Summary of Group/Class Appointments*

This report allows the user to generate a summary of Group/Class Appointments and topics offered at appointments attended or missed by Participants. The report can be run for all Clinics or a single Clinic in a Local Agency for a user specified date range.

1. Click on Outputs from the menu bar.
2. Position the cursor on Reports; the reports sub-menu is displayed.
3. Click on Summary of Group/Class Appointments as shown below:




The Summary of Group/Class Appointments Window is displayed:

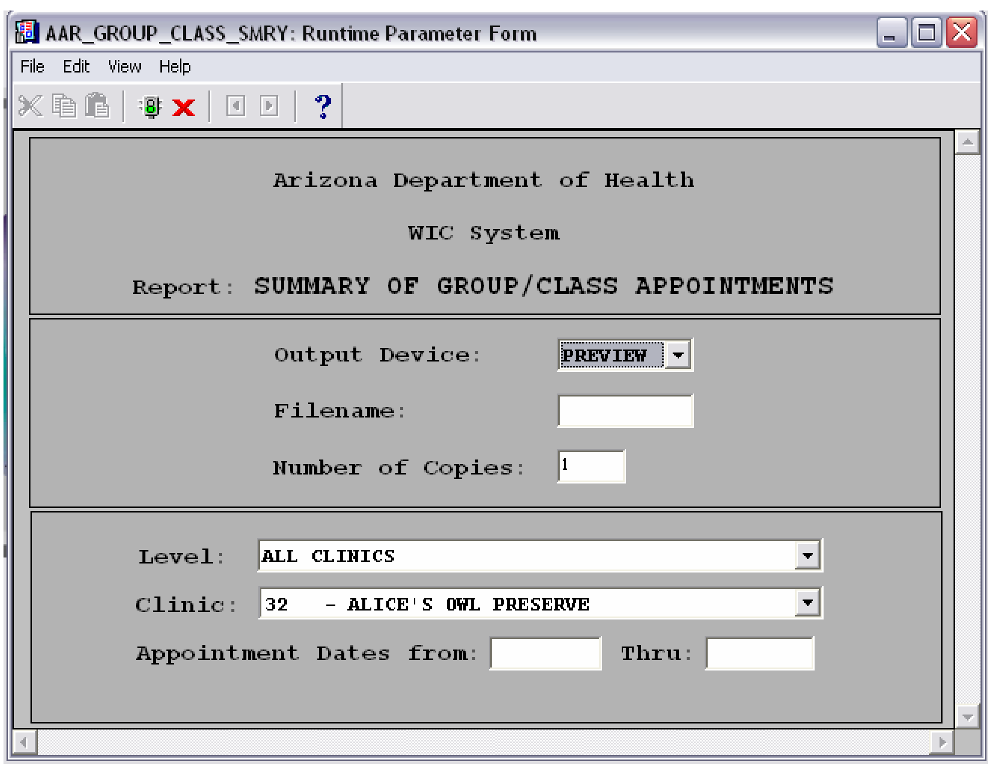
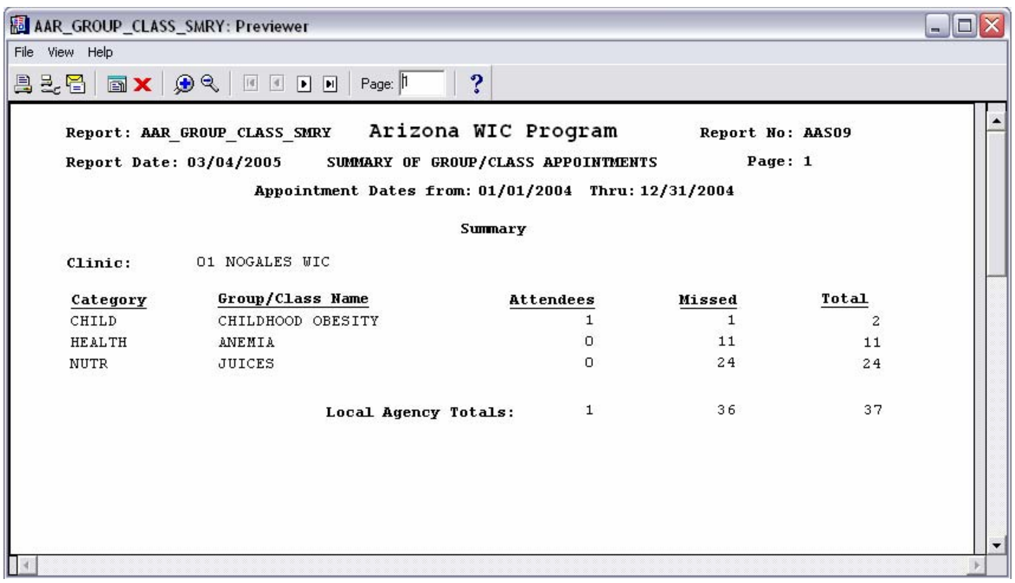



**Figure 61 - Summary of Group/Class Appointments**

Produce a Summary of Group/Class Appointments

1. Click the down arrow in the Output Device field to activate the drop down box, then select to which output device the Summary of Appointments report will be sent by clicking that device name.
2. TAB to the Filename field if “File” was selected as the Output device. Enter the filename to give to the report being generated.
3. TAB to the Number of Copies field. Select the number of report copies desired by typing that number in this field.
4. Click the down arrow in the Level field to activate the drop down box, then select whether to display appointments for all clinics or for a single clinic by clicking on the correct level.
5. If Level “Clinic” was selected, click the down arrow in the Clinic field to activate the drop down box, then select the clinic for which the report is being produced by clicking on the clinic name. The clinics available for selection will be based upon the users log on.
6. Next, click on the Appointment Dates From field and enter the beginning appointment date the report will cover. This date should be formatted: MM/DD/YYYY.
7. Press the TAB key once to move to the Thru field and enter the ending appointment date the report will cover. This date should be formatted: MM/DD/YYYY.
8. Click the green light icon to bring up the preview screen shown below:




Report: AAR_GROUP_CLASS_SMRY Arizona WIC Program Report No: AAS09
Report Date: 03/04/2005 SUMMARY OF GROUP/CLASS APPOINTMENTS Page: 1
Appointment Dates from: 01/01/2004 Thru: 12/31/2004

Summary

Clinic: 01 NOGALES WIC

| Category | Group/Class Name | Attendees | Missed | Total |
|---|---|---|---|---|
| CHILD | CHILDHOOD OBESITY | 1 | 1 | 2 |
| HEALTH | ANEMIA | 0 | 11 | 11 |
| NUTR | JUICES | 0 | 24 | 24 |
| | Local Agency Totals: | 1 | 36 | 37 |

Sample Summary of Appointments(Summary version)

9. Click the Previous, Next, First, Last, and Page icons at the top of the screen to move forward and backward through the report pages.
10. Click the Print icon to print the report. To activate the system’s e-mail capabilities, click the Mail icon. The mail function is not currently available in the AIM system.
11. Click the Close icon to exit the preview screen and return to the Appointment Scheduler Menu Screen.
12. Click the New icon to view a new copy of the same preview screen.

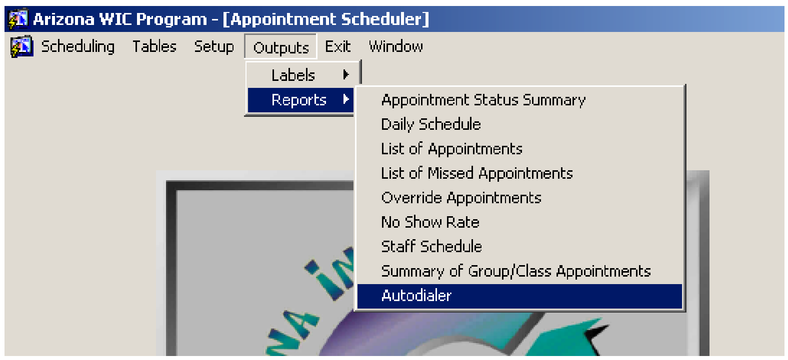
*Fields*

**Output Device -** The user may select (from a drop down list) screen, file, printer, mail, or preview.
**Filename -** If file is selected (above), the directory and filename are entered.
**Number of Copies -** If printer is selected (above), the number of copies desired is entered.
**Level -** The user may select all clinics to report on.
**Clinic -** Clicking on this list of values button allows the user to select the single clinic to be reported on.
**Appointment Dates From -** The user may enter the earliest date that the report will select records on. This field is required.
**Thru -** The user may enter the latest date that the report will select records on. This field is required.

### *Producing a List of Missed Appointments Unreached by Auto-Dialer Report – Not in production in Arizona*

This report displays appointments, which have been missed by clinic, client, dates, starts time, and was not reached by the auto-dialer mechanism. Final format for this report is pending Arizona's decision on auto-dialer implementation.

1. Click on Outputs from the menu bar.
2. Position the cursor on Reports; the reports sub-menu is displayed.
3. Click on List of Missed Appointments  Unreached by Autodialer as shown below:




The List of Missed Appointments Unreached by Auto-dialer Window is displayed:

**THIS SCREEN IS STILL BEING FINALIZED AND IS NOT YET AVAILABLE**

**Figure 62 - List of Missed Appointments Unreached By Autodialer**

Produce a List of Missed AppointmentsUnreached by Auto-dialer Report

1. Click the down arrow in the Output Device field to activate the drop down box, then select which output device the List of Missed Appointments Unreached by Auto-dialer report will be sent by clicking that device name.
2. TAB to the Filename field if File was selected as the Output device. Enter the filename to give to the report being generated.
3. TAB to the Number of Copies field. Select the number of report copies desired by typing that number in the field.
4. Click the down arrow in the Report Type field to activate the drop down box, then select whether to display appointments for all clinics or for a single clinic by clicking on the correct type.
5. If a "Clinic" Type was selected, click on the list of values to the right of the Clinic field to select a specific clinic.
6. TAB to the Dates From field and enter the date that the report will be generated from.
7. TAB to the Dates To field and enter the date that the report will be generated to.
8. Click on the list of values to the right of the Sort By field to select the method for the system to sort data by.
9. Click the green light icon to bring up the preview screen shown below:

**NOT YET AVAILABLE**

Sample List of Missed Appointments Unreached by Auto-dialer Report

10. Click the Previous, Next, First, Last, and Page icon at the top of the screen to move forward and backward through the report pages.
11. Click the Print icon to print the report. To activate the system's e-mail capabilities, click the Mail icon. The mail function is not currently available in the AIM system.
12. Click the Close icon to exit the preview screen and return to the Appointment Scheduler Menu Screen.
13. Click the New icon to view a new copy of the same preview screen.

*Fields*

**Output Device -** The user may select (from a drop down list) screen, file, printer, mail or preview.
**Filename -** If file is selected (above), the directory and filename are entered. This field is mandatory if the file is selected as the Output device.
**Number of Copies -** If printer is selected (above), the number of copies desired is entered.
**Report Type -** The user may select (from a drop down list) the type desired.
**Clinic -** If "Clinic" Report Type is selected, clicking on this list of values button allows the user to select the clinic. This field is mandatory if "Clinic" is selected as the Report Type.
**Date From -** The user may enter the earliest date that the report will select records on. This field is required.
**Date To -** The user may enter the latest date that the report will select records on. This field is required.
**Sort By -** The user may select the method by which the system will sort data by to generate the report.

# List of Figures